

STATE OF OHIO COMBINED CHARITABLE CAMPAIGN (CCC) POLICIES AND PROCEDURES

Revised: June 12, 2023

I. PURPOSE OF THE COMBINED CHARITABLE CAMPAIGN

The purpose of the combined charitable campaign is to allow state employees to express their generosity and benefit a wide variety of charities, while minimizing workplace disruption and administrative costs. These policies and procedures, along with Ohio Administrative Code Section 123:1-28-01, govern the State of Ohio Combined Charitable Campaign (CCC).

II. BASIC PREMISES OF THE CAMPAIGN

The State of Ohio Combined Charitable Campaign (CCC) is guided by the following basic premises:

- 2.1 Employee Ownership** - State employees own the CCC. Campaign leadership and solicitation are by state employees. Contributions by state employees are voluntary and are made to eligible federations and/or member charities of their choice.
- 2.2 Employee Involvement** - The involvement of labor and management employees is regarded as beneficial both to the annual campaign effort and to overall employee morale and productivity. Therefore, following accepted practice in business, industry and government campaigns, it is the policy of the State of Ohio (OAC:123-128-01) to permit time during the working day for state employees to participate in campaign planning, promotion, solicitation and related activities.
- 2.3 Payroll Deduction** - Central to these policies is the concept that payroll deduction is a preferred method of charitable giving, providing both contributor convenience and an enhanced level of financial support for vital voluntary health and human services. Employees wishing to contribute to the CCC should be encouraged to consider this method of payment.
- 2.4 One Time Donations** - One-time (cash/check/credit card/electronic check) contributions will also be accepted. Cash and paper check donations may be made using a paper pledge form. Credit card and electronic check contributions may be made using ePledge.
- 2.5 Focus on All Federations** - During the campaign time period, presentations to employees are to reflect all federations participating in the campaign. Kick-off events and charity information fairs are designed to disseminate information on federations participating in the campaign. At these functions, federation items are not to be sold nor are donations to be accepted for items for individual charities. At the request of an agency or group of employees, representatives from a specific federation or charity may make a presentation in the context of an informational session that also provides information on all campaign participants. All special events held during the campaign time frame must be initiated by state employees, must be identified as CCC functions and, if proceeds are to be designated, must clearly identify the federation(s) and/or member charity(s) that will benefit from the dollars raised.
- 2.6 Sole Appeal** - The CCC is the sole appeal for charitable contributions through payroll deduction for state employees. Charitable solicitations by participating federations and charities may only be conducted during the annual campaign, which is approximately six to eight weeks in August through

October, as designated by the State Steering Committee (SSC). This time frame may be extended as needed by the State Steering Committee. With the exception of Operation Feed, and similar campaigns, whose primary focus is gathering food for those in-need in local communities, the CCC is the only State sanctioned fundraising program.

- 2.7 Solicitation of Employees** - Employee solicitations are to be conducted during work hours, on-site, by state employees, using accepted methods that permit true voluntary giving and reserve to the individual contributor the right of disclosing any donation or keeping it confidential. There will be no coercive activities in the CCC. Giving guidelines may be provided; however, they will be accompanied by a statement explaining that the guideline is provided in response to employee requests, but that the decision to give and the amount given is up to each employee.

III. DEFINITIONS

- 3.1 Administrative Costs** - are an organization's percentage of total support and revenue spent on administration and fundraising. For CCC reporting purposes, this percentage is computed from information on the IRS Form 990, by adding the amount spent on "management and general" currently (Page 10, line 25C) to "fundraising" currently (Page 10, line 25D) then dividing the sum by "total revenue" currently (Page 9, line 12A).

- 3.2 Campaign Coordinating Organization (CCO)** - is a participating federation chosen to assist the state in running the Combined Charitable Campaign. At the state level, the CCO provides advice and assistance to the state steering committee and its subcommittees in planning and conducting the campaign, handles accounting functions and distributes funds to all participating federations.

- 3.3 Campaign Liaison** – is a person hired by the CCO for the campaign time period, and for a reasonable length of time before and after the campaign. They work with the CCO to assist state agencies in running their campaigns, and to perform a variety of administrative tasks necessary to the campaign.

- 3.4 Designation** – is an employee selection of a federation and/or member charity, by making a pledge. Each selection constitutes a designation. If an employee does not make a selection, this constitutes an undesignated pledge.

- 3.5 Direct Health and Human Services** - For the purposes of the CCC, direct health and human services are any combination of programs designed to assist those in need. Examples of direct health and human services are programs aimed at one or more of the following:

- o adoption assistance
- o emergency shelter care and relief services
- o family, child and adult day care services
- o food and nutrition services
- o foster care for children and adults
- o health support services; or a combination of programs or services specifically designed to meet the needs of children and youth, the ill and infirm, the mentally and physically challenged, the elderly, poor, minorities or women.
- o information, referral and counseling services
- o neighborhood and community organization services
- o preservation of the rights of animals, for those animals that provide direct benefits to people
- o programs or services for school age children with special needs
- o protection, preservation or restoration of the air, water and land, if these provide direct benefits

- to people
- o recreational services
- o safety and protective services for children and adults
- o safety services
- o service, support, research and education in the health fields
- o services related to the management and maintenance of the home
- o social adjustment and rehabilitation services
- o the preparation and delivery of meals
- o transportation services

3.6 Federation - An umbrella charitable organization with at least three member charities that meet all eligibility requirements for participation in the Combined Charitable Campaign. An organization with multiple chapters is not normally considered a federation under this definition; however, all organizations participating in the campaign prior to 1997 will be deemed to meet the requirements of this definition for the purpose of continuing participation. Each federation must directly provide or indirectly support health and human services.

3.7 State CCC Co-Chairs - State employees, including a cabinet level employee named by the governor and a representative of organized labor named by the union representing the largest number of state employees, who provide statewide leadership for the annual campaign.

3.8 State Steering Committee (SSC) - An interagency committee responsible for developing campaign materials (e.g. Combined Charitable Campaign Resource Guide, posters and pledge forms), planning special events and performing other public relations and communication duties related to the annual campaign, approving policy and procedure changes, participation requests, auditing federations and member charities eligibility, setting campaign goals, campaign materials and making other decisions about the annual campaign.

3.9 Voluntary Contributions - Are employee and retiree donations.

IV. ROLES AND RESPONSIBILITIES

4.1 Governor - The governor sets the tone and spirit of the CCC by providing leadership and support.

The governor:

- a. Selects a cabinet level state employee as State CCC Co-Chair.
- b. Encourages cabinet members, agency directors and state employees to support the CCC.
- c. May participate in the statewide kickoffs and video.
- d. Receives interim progress reports and the final summary report from the CCC co-chairs and shares this information with the cabinet.

4.2 Director - The director of the Department of Administrative Services ensures statewide compliance with CCC rules, policies and procedures; provides administrative support for the campaign; and is the final arbiter on participation appeals and policy decisions.

4.3 Organized Labor - Organized labor provides leadership and support for the campaign and encourages union member participation in the campaign.

Organized labor:

- a. Selects a State Labor CCC Co-Chair.
- b. Selects state agency and local agency labor coordinators.

- c. Endorses the campaign through newsletter articles and other means available to communicate with members.
- d. Communicates with local districts to share opportunities for their individual chapter to donate to the campaign on behalf of chapter members.
- e. Recruits union members to participate on the State Steering Committee.

4.4 CCC Co-Chairs - The CCC Co-Chairs provide the public focus of the state's commitment to the CCC. The co-chairs are a cabinet level management employee, selected by the governor, and a representative of organized labor, selected by the union representing the largest number of state employees.

The co-chairs:

- a. Mobilize and promote top-level leadership for the campaign among state agencies and encourage voluntary participation by state employees.
- b. Secure the appointment of state steering committee (SSC) and other subcommittee members.
- c. Secure the appointment of campaign coordinators from each agency.
- d. Preside over the SSC meetings.
- e. Work with the SSC to arrange well-publicized statewide kickoff events, with the participation of the governor whenever possible, to signal the beginning of the CCC campaign throughout the State.
- f. Work with the SSC to arrange and effectively publicize campaign events.
- g. Work with the CCO and the SSC to establish a statewide campaign goal and to recommend individual agency goals.
- h. Prior to the beginning of the annual campaign, make a presentation to the governor's cabinet, explaining the annual theme and goal and encouraging top level support for the campaign.
- i. Prepare and submit a summary report to the governor and labor by April 1st of each year following the campaign.

4.5 State Steering Committee (SSC) - The State Steering Committee (SSC) plans the annual campaign and makes participation and policy decisions. The SSC includes the state campaign co-chairs, Ohio Department of Administrative Services (DAS) state campaign liaison, and a minimum of five additional state agency representatives and fairly represents management and labor. Agency members serve on a rotating basis, with each representative making a commitment of at least two (2) years. A representative of the CCO also serves on the SSC as a non-voting member. State CCC co-chairs are the presiding officers of the SSC.

The SSC:

- a. Approves changes in CCC rules, policies and procedures.
- b. Approves or disapproves applications for participation and determines continuing eligibility of participating federations and member charities. Annually conducts an audit or in-depth review of all participating federations and member charities to ensure that they meet all current eligibility requirements.
- c. Approves the designation of a participating federation as the campaign coordinating organization (CCO), for the annual campaign.
- d. Prior to the campaign, approves a budget to cover all costs related to the campaign. The budget is to be no more than 10 percent of the amount raised in the previous year's campaign.
- e. Determines the beginning and ending solicitation dates of the annual campaign, approximately a six-eight week time frame, normally during the months of August through October.
- f. Attends monthly meetings, participates in coordinator training, attends campaign kickoffs (at least one in-person event preferred) and participates in application reviews.

1. Members are expected to attend at least 60% of monthly steering committee meetings (approximately 3 hours per month).
 2. Participate in one or both kick-off events in August (approximately 3 hours each).
 3. Assist with the charity application review process in February (from 2 to 30 hours based on availability).
 4. Encourage voluntary participation by state employees during CCC.
- g. Oversees the annual campaign:
1. Designs or updates the campaign logo, as needed, and selects the annual campaign theme.
 2. Manages the production of the annual campaign video.
 3. Designs and arranges for the publication of all annual campaign materials, including but not limited to the resource guide, poster, pledge form and campaign report envelope.
 - ~~4. Selects recognition items.~~
 4. ePledge enhancements.
- h. Drafts correspondence from the governor to executive officers and state employees, encouraging their participation in the campaign.
- i. Plans and coordinates the annual coordinator training, campaign kickoffs.
- j. Determines the number of campaign liaisons needed for the campaign, based on recommendations from the CCO.
- k. With advice from the Ohio Department of Administrative Services concerning payroll system capacities, determines the minimum contribution necessary to participate in payroll deduction.
- l. The Steering Committee may grant permission for solicitations of state employees in support of victims of national or state emergencies and disasters, such as hurricanes, tornados, floods, high water, earthquake, landslide, mudslides, fire, explosions or other catastrophes as declared by the President of the United States or the Governor of Ohio. The Steering Committee may grant approval of the addition of a legitimate charity not already in the campaign in support of such national or state emergency or disaster.
- m. Has the authority to limit the number of federations and member charities participating in the CCC.
- n. Has the authority to redistribute campaign donor recognition items from previous years to solidify the success of future campaigns through recruitment and marketing plans.
- o. Federation participation on the SSC will be determined on a rotating basis amongst the eligible local federations for the current campaign year for a maximum of two (2) consecutive years.
- p. Any and all campaign events may be held in-person or virtual. Steering committee members are encouraged to participate in-person whenever possible.

4.6 State Campaign Liaison - The State Campaign Liaison is appointed by the director of the Ohio Department of Administrative Services (DAS) and provides on-going administrative support for the campaign.

The state campaign liaison:

- a. Serves on the SSC and other subcommittees when necessary.
- b. Monitors compliance with rules, policies and procedures and, on an annual basis, recommends needed revisions.
- c. Provides assistance with the application review process.
- d. Provides and/or arranges for necessary administrative support for the CCC.
- e. Arranges for messages on state employee website to help promote participation in the campaign.

4.7 Campaign Coordinating Organization (CCO) - The Campaign Coordinating Organization (CCO) conducts the campaign on behalf of all state employees and participating federations. The CCO is selected through the DAS, Request for Proposal (RFP) procedure and is accountable to the SSC to manage the campaign fairly and equitably in accordance with the RFP and established CCC Policies

and Procedures; to conduct its duties on behalf of all CCC participants separate and apart from the operation of its own organization; to share pertinent information with participating federations; and to be responsive to reasonable requests for information from campaign participants.

The CCO:

- a. Must use the logo approved by the SSC for all CCC purposes.
 - b. Provides staff services to the SSC co-chairs, state steering committee and other sub committees.
 - c. Works with the SSC to develop campaign themes and logos; to produce the video, printed materials; to develop campaign strategies, timelines and staff requirements; and to recruit and train volunteers to assist in facilitating the campaign.
 - d. Serves as the central accounting point for contributions received from the State and distributes funds to all participating federations.
 - e. By March 15 of each year, prepares and submits a budget to the SSC for approval. The budget, which limits expenses to 10 percent of the amount raised in the previous year's campaign, is to include all costs necessary to conduct the annual campaign and to handle related record keeping and funds distribution.
 - f. Maintains a separate account for managing the income and expenses of the CCC.
 - g. Begins distribution of campaign funds received from state employees to participating federations within sixty days of December 31st of the campaign year, with an initial analysis of gross campaign income by payroll deduction donations, one-time contributions, special events, expenses and projected shrinkage. Thereafter, distribution of funds to federations will be made no less frequently than bi-monthly.
 - h. Provides an end of campaign report to the SSC and to participating federations by April 1st of the year following each campaign. The report provides state agency and federation breakdowns.
 - i. Furnishes an annual audit of the CCO to the SSC for the most recently completed CCO fiscal year. The audit is to be submitted within 120 days of the end of the CCO fiscal year and is to be certified by an independent public accountant.
 - j. And other duties as specified in the contract between the CCO and the CCC.
- 4.8 Campaign Liaisons (CL)** - These employees work on an hourly basis for a specific period of time during the annual campaign to assist in the operation of the CCC. They are recruited by the state CCC and co-chairs, with recommendations from the SSC and should include representatives of management as well as employees recommended by organized labor. The number needed will be determined by the SSC with advice from the CCO.
- 4.9 State Agency Directors** - The director of each state agency sets the tone and provides leadership for the agency campaign.

Each director:

- a. Ensures that voluntary fundraising within the department or agency is conducted in accordance with these policies and procedures (OAC:123-128-01).
 - b. Communicates support for the CCC to agency employees statewide.
 - c. Appoints agency coordinators within the agency's central office. Coordinators should include both an exempt and a bargaining unit employee. The bargaining unit coordinator shall be appointed/or recommended by the union with approval from state agency directors.
- 4.10 State Agency Coordinators** - State agency coordinators manage the campaign at the agency level. Ideally, both an exempt and a bargaining unit employee are named as coordinators by the agency director and labor.

State agency coordinators:

- a. Manage the official statewide campaign within their agencies, assist in achieving the agency goal and provide active “hands on” support (OAC:123-128-01).
- b. Work with the CCO and Campaign Liaisons (CLs) to achieve a successful campaign.
- c. Ensure that personal solicitations on the job are organized and conducted in accordance with the procedures set forth in these regulations, and in Section 123:1-28-01 of the Ohio Administrative Code.
- d. Communicate the benefits of the CCC to their co-workers, encourage participation by payroll deduction, explain how to designate gifts and answer employee questions regarding the campaign.
- e. Help secure the involvement of committee members at institutions or local offices. Provide training, direction and guidance to the agency committee members.
- f. Any and all campaign events may be held in-person or virtual. Agency coordinators are encouraged to participate in-person whenever possible.

4.11 Agency Key Workers - Agency key workers are recruited by their respective state agency coordinators, and manage the campaign in local offices, districts or institutions.

Agency key workers:

- a. Manage the official campaign within their institution, district or office, assist in achieving campaign goals and provide “hands on” support for the campaign.
- b. Ensure that personal solicitations on the job are organized and conducted in accordance with the criteria set forth in these policies and procedures, and in Section 123:1-28-01 of the Ohio Administrative Code.
- c. Work with the agency coordinator to achieve a successful campaign.
- d. Communicate the benefits of the CCC to their co-workers, encourage participation by payroll deduction, explain how to designate gifts and answer employee questions regarding the campaign.
- e. Personally solicit employees in their assigned area.
- f. Report all pledges and contributions to the state agency coordinator and ensure that pledge forms are properly completed and distributed.
- g. Assist in planning campaign strategies and special events.

V. ELIGIBILITY REQUIREMENTS

5.1 Participating Federation - Only a not-for-profit, tax exempt, charitable federation, that directly provides or indirectly supports health and human services as defined under “Direct Health and Human Services” in the definition section of the CCC Policies and Procedures, are eligible to participate in the CCC. To be eligible for participation, each federation must:

- a. Submit a completed CCC Application.
- b. Have at least three (3) member charities that meet all CCC eligibility requirements and are approved for participation in the campaign.
- c. Must notify the CCO, within 30 days, of any change with a member charity that results in discontinued participation in the campaign. This includes, but is not limited to; charity closure, charity merger, or charity no longer being a member of the federation. Failure to do so may result in review by the SSC.

5.2 Federation and Member Charities - In addition to the federation requirements, to be eligible for participation in the CCC, each federation and all of its member charities must:

- a. Have administrative costs of 30.0 percent or less. In a case where the federation and/or some of its member charities have administrative costs in excess of 30.0 percent, the federation and/or member charity must demonstrate in writing to the satisfaction of the SSC that its administrative costs are reasonable and include a formal plan to reduce these expenses. If the federation or member charity's justification and plan are found to be acceptable by the review committee, the federation or charity may be granted a one-year waiver to participate in the campaign with the expectation that the overhead percentage will be reduced from the previous year's amount in subsequent years. Charities with administrative costs higher than 55.0 percent will not be accepted.
- b. Be incorporated and/or authorized to do business within Ohio as voluntary, not-for-profit organizations, and are current in their requirement to register, pay filing fee, and file the annual financial reports with the Ohio Attorney General, registered and reporting annually with the Ohio Attorney General as required by Chapters 109 and 1716 of the Ohio Revised Code.
- c. Have and maintain status as a tax-exempt agency under 26 U.S.C. 501(c)(3) and be eligible to receive tax deductible contributions under 26 U.S.C. 170, the Internal Revenue Code, and applicable laws of the State of Ohio. Submit a copy of the IRS 501(c)(3) for each federation and member charities with the annual application.
- d. Be directed by an active board of trustees who have no material conflict of interest.
- e. Adopt and employ the Standards of Accounting and Financial Reporting for Voluntary Health and Welfare Organizations and make available to the general public an annual external audit by an independent public accountant or a signed copy of IRS Form 990.
- f. Be registered with the IRS as a 501(c)(3) for at least two (2) years prior to the date of application.
- g. Have a stated policy that complies with all requirements of state and federal laws and regulations on non-discrimination and equal opportunity with respect to its clients, officers, employees and volunteers.
- h. Provide funds, programs or services directed at one or more of the common needs, as defined under "Direct Health and Human Services" in the "Definitions" Section of the CCC Policies and Procedures.
 1. A federation also may meet this qualification by providing support or services to member charities who directly provide health and human services.
 2. Such services may not be a part of any program operated by government or by any educational institution.
 3. Service organizations with a religious affiliation are eligible to participate in the campaign if the services they provide meet the definition of "Direct Health and Human Services" and are provided without regard to the religious beliefs or affiliation of those receiving the services.
 4. Such service organizations must also have their own 501(c)(3) designation and their own board of directors, separate from the church or religious organization with which they are affiliated.
- i. Agree to pay its share of campaign costs, based on its share of contributions received through the campaign.
- j. Adhere to all rules, policies and procedures of the state CCC program. If a federation or member charity fails to adhere to the rules of the CCC, eligibility to participate may be withdrawn by the SSC with written notification to the federation. Failure of a federation and/or member charity to comply with policies and procedures of the CCC may result in sanctions up to and including removal from future campaign(s), by vote of the SSC. Be advised that noncompliance with the established CCC Policies and Procedures by a member charity of a federation, shall subject the nonconforming member charity either to disqualification from participation in the charitable

campaign for that year or any other sanction determined to be appropriate. A federation may be notified of its ineligibility at any time.

- k. The federation may appeal, or appeal on behalf of a member charity, the withdrawal of eligibility as provided in Section 123:1-28-01 of the Ohio Administrative Code.

Participants in payroll deduction before January 1, 1991, (i.e. United Way, The College Fund/UNCF and International Service Agencies) together with those agencies that were members of these federations as of January 1, 1991, shall be deemed to meet federation status. A Special Wish Foundation, approved for participation in 1994, shall be deemed to meet the definition of “federation” as used in these policies. “This Designation however shall not exempt these Federations and Member Agencies from operating within and conforming to the standards prescribed in the established CCC Policies and Procedures.”

- l. Be further advised, that any remedial action that shall be individually imposed upon a member charity for its noncompliance with the CCC Policies and Procedures may negatively impact the participation of the federation for the campaign year.
- m. When a federation becomes noncompliant with the established eligibility requirements of the CCC Policies and Procedures as a result of a disqualification or sanction(s) imposed on a nonconforming member charity, the federation along with all of its remaining member charities shall be subject to disqualification from participation in the charitable campaign for that year in like manner.
- n. When a federation is determined to be noncompliant with the eligibility requirements of the established CCC Policies and Procedures, the federation shall be subject to disqualification from participation in the charitable campaign for that year or any other sanction determined to be appropriate, whereby, each member charity of the federation shall be negatively impacted in like manner.

VI. APPLICATION PROCESS

Each participating federation must certify that it meets the eligibility requirements delineated in these policies and procedures, certify that these member charities meet the application requirements.

6.1 Application Deadline and Information - Federations seeking participation in the CCC must submit an application online no later than the date specified by the CCO. The SSC will provide an application platform for this purpose. No paper applications will be accepted without prior CCO approval.

- a. The application must include, but is not limited to, the required certifications, documentation and attachments by the responsible administrative officers that the federation and each of its member charities participating in the CCC meet the criteria for CCC eligibility, as listed under Section V of the CCC Policies and Procedures.
- b. The application must include, but is not limited to, the following attachments:
 - 1. A list of the federation and all member charities that are applying for participation in the campaign to include: 25-word statements describing direct health and human services benefits provided by each member charity; employer identification number (EIN); and administrative costs (defined under “Direct Health and Human Services” in the definition section of the CCC Policies and Procedures.)
 - 2. Justification in writing and a formal plan to reduce expenses for each federation and member charity with administrative costs that exceed 30.0 percent. If the federation or member charity’s justification and plan are found to be acceptable by the review committee, the federation or charity may be granted a one-year waiver to participate in the campaign with

the expectation that the overhead percentage will be reduced from the previous year's amount in subsequent years. Charities with administrative costs higher than 55.0 percent will not be accepted.

3. Federations/member charities that are applying for the first time, must have administrative costs below 35.0%. If the overhead expenses are over 30.0%, the federation/charity must provide written justification and a formal plan to reduce expenses.
4. A completed "Verification of Registration with the State of Ohio Attorney General's Office" for any federation that was not approved for the previous year's campaign.
5. IRS 501(c)(3) for any federation and each member charity that were not approved for the previous year's campaign.
6. Most recently completed IRS 990 for the federation and each member charity, not more than 2 years prior to the campaign year, unless the federation or member charity cannot provide a 990 that covers the required fiscal period due to delays caused by the COVID-19 pandemic, in which case a 990 that covers a timeframe including Jan. 2021 or more current, may be provided if accompanied by a written explanation detailing the specific reason for the substitution.
 - a. An IRS 990 must be completed in accordance with IRS regulations to be eligible for the CCC.
 - b. Page one of the IRS 990 form must be signed. A physical signature is preferred, but the electronic signature page with a pin will be accepted.
 - c. If the Internal Revenue Service does not require the organization to file the Form 990, the organization must submit completed pages 1, 9 and 10 of the IRS Form 990. (These IRS 990 forms are for application purposes only and will not be filed with the IRS.)
 - d. If the federation or member charity is a subsidiary of a regional or national charitable organization, the IRS 990 for that organization may be used.
7. Official documentation verifying name change (if needed).
8. The required certifications, documentation and attachments for all federations and member charities applying for participation in the campaign must be completed and submitted by the application deadline. Federations and/or member charities submitting late materials may be denied.
9. Failure of a federation/member charity to comply with the established application process/protocols for a campaign year can result in either the disqualification of the federation/member charity from participating in the CCC for that year or the imposition of other sanctions determined to be appropriate against the nonconforming federation/member charity. The imposition of remedial measures against a federation/member charity for its noncompliance with the established CCC Policies and Procedures may result in the negative ramifications delineated under Section V of these policies.

6.2 Application Review - The SSC will conduct a review of all applications from federations and their member charities.

- a. The SSC may request information from a federation for clarification of the application. Federations must submit information by requested date.
- b. If a federation or member charity is found not to meet the eligibility requirements, approval to participate in the CCC shall be withdrawn and the federation will be notified in writing no later than May 15 of the campaign year. A federation may appeal such a withdrawal to the SSC and then to the director of the Ohio Department of Administrative Services in accordance with Section 123:1-28-01 of the Ohio Administrative Code.
- c. Applications that are incomplete may not be amended during the appeal process. Note: Missing documentation that was required in the application cannot be added as part of the appeal.

6.3 Notification of Eligibility – Following the application review process federations will be notified in writing by the SSC of their status and the status of their member charities. This notice will be sent no later than May 15 of each campaign year. If a federation or member charity is refused initial or continued participation in the CCC, the federation may appeal the decision to the SSC and then to the director of the Ohio Department of Administrative Services in accordance with Section 123:1-28-01 of the Ohio Administrative Code. The appeal must speak directly to the reasons for disapproval, and the applicant must provide supporting documentation when the appeal is filed. Missing documentation that was required in the application cannot be added as part of the appeal. The SSC will provide any federation, whose application for participation is disapproved, with copies of the Administrative Code section governing appeals.

VII. CAMPAIGN COORDINATING ORGANIZATION

7.1 Campaign Coordinating Organizations - To qualify for selection as the CCO a federation must:

- a. Be a current participant in the CCC.
- b. Be registered with the Ohio Attorney General pursuant to ORC 109 and 1716.
- c. Qualify as a voluntary health and human services agency within the meaning of 26 U.S.C. 501(c)(3) and be eligible to receive tax deductible contributions under 26 U.S.C. 170.
- d. Demonstrate experience in managing workplace campaigns and efficiency in raising money.
- e. The CCO must have a presence in the community in which the state offices and institutions they are assisting are located.

7.2 CCO Applications - Applications to serve as the CCO must be submitted to the Ohio Department of Administrative Services with the criteria and timeline determined by the SSC. If the SSC fails to take action the director of the Ohio Department of Administrative Services shall select the federation or charity to serve as CCO. Those federations applying to be CCO may apply for a period of up to four (4) years. Termination of a CCO will be subject to a sixty (60) day notice.

VIII. CONDUCTING THE CAMPAIGN

The following criteria will be adhered to in conducting the annual Combined Charitable Campaign:

8.1 Federation Participation - The SSC will involve participating federations in the planning process prior to the implementation of the annual campaign; optimally, representatives of three of the participating federations will serve on the committee during the entire planning process.

8.2 Designation of Contributions - State employees may designate from one to eight federations and/or member charities. Employees may designate their payroll deductions or one-time contributions by using the designation codes from the Combined Charitable Campaign Resource Guide from the current campaign year on their pledge forms or online.

8.3 Allocation of Funds - All funds collected from state employees must be allocated only to those federations and member charities that have been determined eligible for the CCC for the current campaign year. Eligibility will be granted only for fundraising campaigns in support of current operations. Capital fund campaigns are not authorized.

8.4 Pledge Verification - State employees who contribute to the CCC through ePledge will receive a pledge verification electronically after confirming their pledge. Employees who contribute via hard

copy pledge form (more than \$26 annually) will receive a pledge verification from the CCO by May 15 of the following year.

IX. DISTRIBUTION OF FUNDS

The CCO will distribute all campaign funds to participating federations in accordance with the following procedures:

- 9.1 **Designated Funds** - All designated funds will be distributed among the federations for distribution to their member charities participating in the CCC.
- 9.2 **Undesignated Funds** - Undesignated funds will be distributed to each federation based on its percentage of the total designated funds raised in the campaign.
- 9.3 **Deduction of Costs** - Each participating federation and member charity will have withheld from its distribution of funds its share of campaign costs, which will be calculated on the basis of each participant's percentage of the total funds raised.
- 9.4 **Timing of Distributions** - The CCO will begin distribution of one-time contributions to participating federations within sixty (60) days of December 31st of the campaign year. After the initial distribution of the one-time contributions, distribution of payroll deduction funds will be made to the federations no less frequently than bi-monthly.
- 9.5 **Distribution to Member Charities** - The federation is responsible for distributing to each member charity an appropriate share of all designated and undesignated funds received through the campaign. The actual funds forwarded to each charity will be based on the total pledged amounts made to that charity, minus appropriate administrative costs. Distribution of funds to the designated member charities must be within 90 days of receipt from the CCO.

QUESTIONS

If you have questions concerning the Combined Charitable Campaign Policies and Procedures, please contact:

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