

UNIVERSITY OF CALIFORNIA

BERKELEY • DAVIS • IRVINE • LOS ANGELES • RIVERSIDE • SAN DIEGO • SAN FRANCISCO



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December 23, 1997

CHANCELLORS LABORATORY DIRECTORS

Guidelines on Payroll Deductions for Employee Contributions for Charitable Drives and Campus Fundraising Campaigns

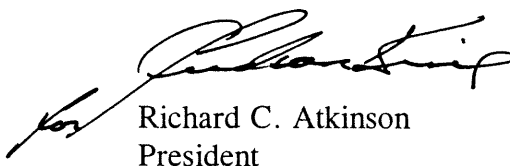
Enclosed are the Guidelines for Payroll Deductions for Employee Contributions for Charitable Drives and Campus Fundraising Campaigns, which are effective immediately, and supersede those issued by President Saxon on June 29, 1976.

The revised Guidelines reflect the May 1997 action taken by The Regents, which amended the Policy on Payroll Deductions for Charitable Contributions and Development Programs to permit the President to approve payroll deductions for more than one on-campus fundraising campaign (see attached).

While campuses will need to continue to request approval by the President in order to establish payroll deductions for on-campus fundraising campaigns, they need not submit for approval requests to establish separate payroll deductions for any existing program which is part of an approved fundraising campaign. Campuses also may continue to use one payroll deduction, if desired, for multiple programs under a campaign.

The revised Guidelines also eliminate the 12-month limit for establishing payroll deductions involving charitable contributions. Based on this change, payroll deductions for charitable contributions may be established for an indefinite (open-ended) period of time or renewed periodically, at the option of the campus or Laboratory.

Sincerely,



Richard C. Atkinson
President

Attachments

cc: Members, President's Cabinet
Associate Vice President Broome
Assistant Vice President Levin
Assistant Vice President Switkes

Assistant Vice President Van Ness
Special Assistant Gardner
Manager O'Neill
Administrative Vice Chancellors

POLICY ON PAYROLL DEDUCTIONS FOR CHARITABLE
CONTRIBUTIONS AND DEVELOPMENT PROGRAMS

6140

Approved May 19, 1972

Amended May 21, 1976 and May 16, 1997

The President is authorized to approve payroll deductions from employees' wages: (1) at each campus and at each major University-operated Department of Energy Laboratory for contributions to the agency handling the principal or a major combined charitable fund drive in the campus or Laboratory area, as recommended by the Chancellor or Laboratory Director; and (2) at each campus for contributions to one or more campus fundraising campaigns as recommended by the Chancellor for specified student assistance and/or campus development programs, with the understanding that any deductions will be voluntarily authorized by the individual employees, the campus or Laboratory will be reimbursed by or on behalf of the campaign for administrative costs, and that each campaign is subject to approval for payroll deductions by the President in accordance with guidelines to be established by the President.

**GUIDELINES ON PAYROLL DEDUCTIONS FOR EMPLOYEE CONTRIBUTIONS
FOR CHARITABLE DRIVES AND CAMPUS FUNDRAISING CAMPAIGNS**

All community charitable drives and campus fundraising campaigns at each campus or major DOE Laboratory shall be conducted in accordance with the policies of The Regents and the delegations of authority from the President to the Chancellors and Laboratory Directors to approve and conduct fundraising campaigns and to solicit and accept gifts. In addition, in accordance with the action taken by The Regents at the May 1972 meeting (and as amended in 1976 and 1997), the use of payroll deductions for any charitable drive or fundraising campaign shall be subject to the provisions of guidelines established by the President. Certain employee solicitations involving payroll deductions require Presidential approval as provided below.

A. Community Charitable Fund Drives

1. Each Chancellor and each Director of a major DOE Laboratory will have authority to approve payroll deductions from employee wages for charitable contributions to the principal combined fund drive in the campus or Laboratory area.
2. Each Chancellor or Director of a major DOE Laboratory may request that, in lieu of the contributions provided for in 1. above, the President approve a single payroll deduction for one major combined fund drive which provides for employee contributions to be divided in specific amounts for both the principal community fund drive agency and a separate agency or group of agencies in the campus or Laboratory area. Each such agency shall furnish evidence that it qualifies, under applicable Federal and State law, as an organization to which tax-deductible, charitable contributions can be made.
3. Employee payroll deductions under 1. and 2. above shall be entirely voluntary, shall be authorized by the employee in writing for a specific period or for an indefinite period and, subject to payroll deadlines, may be terminated at any time upon written request of the employee.
4. The campus or Laboratory shall be reimbursed by or on behalf of the agency or agencies for machine time, supplies, and other administrative costs.

B. On-Campus Fundraising Campaigns

1. Each Chancellor may request that the President approve payroll deductions for employee contributions to one or more on-campus fundraising campaigns for support of either student assistance programs or campus development programs, or a combination of both. A campaign may include one or more programs or purposes for which funds will be raised.
2. Each request shall state the specific program(s) or purpose(s) for which funds will be used, the campaign goal, and the duration of the campaign.
3. The campus shall be reimbursed by or on behalf of the campaign for machine time, supplies, and other administrative costs.
4. To utilize employee payroll deductions, each on-campus fundraising campaign must meet a student, teaching, research, employee, or other campus development need that cannot be funded adequately from other sources.
5. Payroll deductions from employee wages shall be entirely voluntary, shall be authorized by the employee in writing for a specific period or the approved term of the fundraising campaign, or for an indefinite period and, subject to payroll deadlines, may be terminated at any time upon written request by the employee.

C. General Provisions

Requests for use of payroll deductions for programs not specifically addressed in these guidelines shall be submitted to the Senior Vice President--Business and Finance, who will coordinate the requests as appropriate and forward them to the President for action. Legal review by General Counsel shall be obtained with respect to all requests for payroll deductions under A.2, above. In accordance with established policy, drafts of all proposed campaign materials shall be approved as to legal form by General Counsel.

Revised, December 23, 1997

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June 27, 1997

CHANCELLOR YOUNG

Dear Chuck:

As you know, in May 1997 The Regents revised the Policy on Payroll Deductions for Charitable Contributions, thereby authorizing the President to approve payroll deductions for contributions to more than one on-campus fund raising campaign (copy enclosed).

Revised Guidelines on payroll deductions for charitable contributions will be issued in the near future. In the interim, I am approving a request forwarded by Vice Chancellor Blackman of your campus (dated April 1, 1996) to allow UCLA to collect contributions for two entities, the Unicamp organization and the UCLA Campaign. In the future, these charitable contributions will be subject to the revised guidelines. In accordance with The Regents' action, contributions through payroll deduction shall be voluntarily authorized by the individual employees and the campus will be reimbursed on behalf of contribution collections for applicable administrative costs.

Sincerely,

Richard C. Atkinson
President

Enclosure

cc: Senior Vice President Kennedy
Administrative Vice Chancellor Blackman
Associate Vice President Broome
Assistant Vice President Levin
Special Assistant Gardner

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