

Florida
State
Employees'
Charitable
Campaign



2011
ORIENTATION
MANUAL

COMPILED BY:

STATEWIDE FSECC FISCAL AGENT
United Way of Florida, Inc.
307-B East Seventh Avenue
Tallahassee, FL 32303

FOREWORD

Thank you for your involvement with the 2011 Florida State Employees' Charitable Campaign (FSECC)! Your selection is indicative of your support and dedication to your state employees' campaign and your personal dedication to accomplishment and success. The FSECC helps many people in need. The key to making the campaign a success is state employees like you, who lend their time, experience, and commitment for the benefit of those who are less fortunate.

To make your job easier, the statewide fiscal agent annually publishes the following guidelines for conducting a successful FSEC Campaign. It is our hope that you find the information in the *2011 Orientation Manual* to be helpful throughout the Campaign.

Once again, thank you for playing such a critical role in the 2011 FSECC. If you have any questions, please don't hesitate to contact either your Fiscal Agent Area United Way (*see page 10*) or Beth Meredith at the United Way of Florida (*see contact information below*).

Beth Meredith, FSECC statewide fiscal agent representative
United Way of Florida, Inc. ▪ 307-B East 7th Ave. ▪ Tallahassee, FL 32303
e-mail: beth@uwof.org ▪ phone: (850) 488-8171

FSECC on the World Wide Web:

<http://dms.myflorida.com/fsecc>

(site maintained by the Department of Management Services)

411 Direct on the Web:

<http://411.myflorida.com/apps/411/tel411.public> 411

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WHAT IS THE FSEC CAMPAIGN?

The Florida State Employees' Charitable Campaign, known as the "FSEC Campaign" or "FSECC", is the only state-sanctioned charity drive among state employees in the workplace. Each year, state employees, who play a key role in conducting the campaign, generously contribute approximately \$4 million to their favorite charities through the FSECC. Until 1993, the campaign was authorized by a Cabinet Resolution. The 1993 Florida Legislature, however, authorized the campaign in Florida law, (Section 110.181, Florida Statutes), in order to address concerns that the Cabinet Resolution provided insufficient authority to promulgate legally binding rules for administering the campaign. The FSEC Campaign is housed, for administrative purposes, in the Department of Management Services (DMS), which provides program oversight and policy guidance through Rule 60L-39, Florida Administrative Code. A Statewide FSECC Steering Committee comprised of nine state employee representatives assists DMS in an advisory role and helps to oversee the allocation of campaign proceeds in accordance with the FSECC law. DMS also contracts with a Fiscal Agent (United Way of Florida, Inc.) to oversee various administrative and accounting duties with the assistance of 26 Fiscal Agent Area United Ways throughout the state.

THE CAMPAIGN WAS INSTITUTED TO:

- Provide state employees an opportunity to voluntarily contribute to the charity or charities of their choice through an easy, payroll deduction process;
- Allow participation by a diverse group of eligible charitable organizations that meet human or environmental needs and range from local to international in their focus; and
- Minimize the cost and disruption of fundraising caused by separate campaigns or drives in the workplace.

CAMPAIGN POLICIES:

- **Giving is voluntary!** No coercion will be tolerated.
- **Criteria for Organizations to be Admitted into the FSEC Campaign:** The FSECC Statewide Steering Committee ensures that an organization applying for inclusion:
 - ◆ has as its principal mission: public health and welfare; education; environmental restoration and conservation; civil and human rights or relief of human suffering and poverty.
 - ◆ is tax exempt under Section 501(c)(3) of the Internal Revenue Code and is properly registered as a charitable organization with the Department of Agriculture & Consumer Services, pursuant to Chapter 496, Solicitation of Contributions Act, Florida Statutes.
 - ◆ provides services either locally or throughout the state or, if they are international charities, have a well-defined program meeting basic human needs in an overseas area with no duplication of existing programs.
 - ◆ shows sound financial/management performance, attested to by an annual audit performed by an independent Certified Public Accountant.
 - ◆ complies with all relevant non-discrimination guidelines as to program recipients, staff, and Board of Directors.
 - ◆ has reasonable fundraising and administrative costs (not exceeding 25%) and has active on-going programs. (The Statewide Steering Committee may recommend organizations with costs that have exceeded 25% in extraordinary circumstances.)
 - ◆ does not engage in activities that contain an element that is more than incidentally political, religious, professional, or fraternal in nature.



ROLES

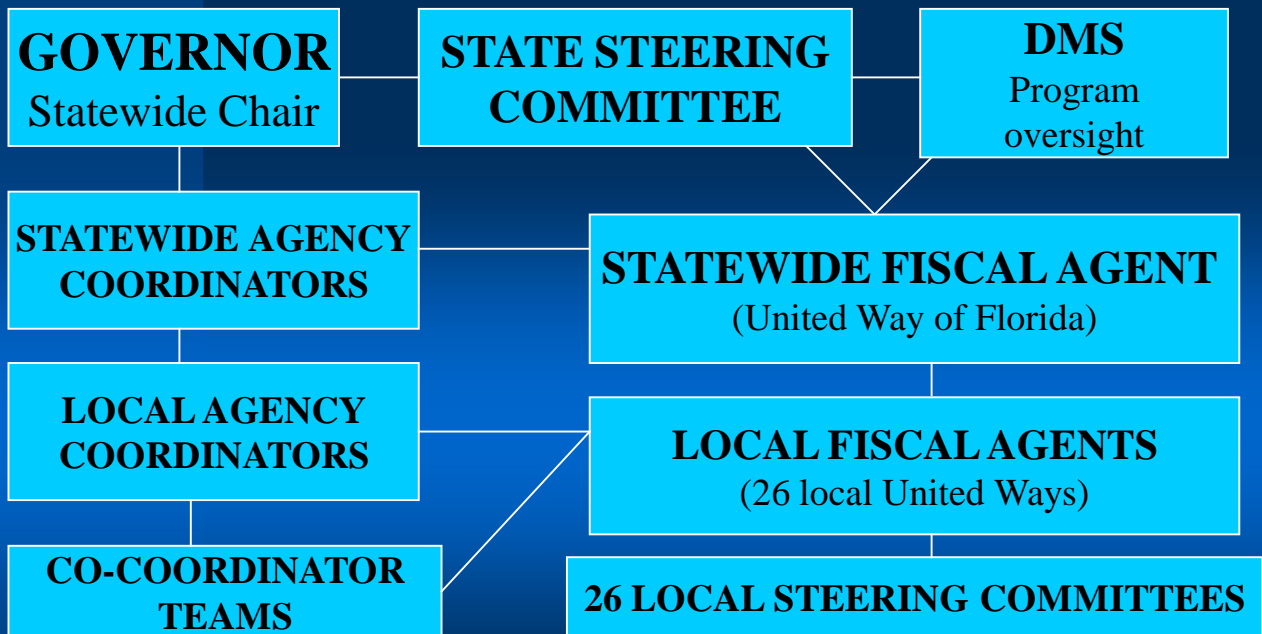
&

RESPONSIBILITIES



FSEC CAMPAIGN STRUCTURE

FSECC STRUCTURE



OVERVIEW OF ROLES IN THE CAMPAIGN

Solicitation of an employee group is a team effort. The size and complexity of the agency will determine the composition of the team. Generally, the levels of responsibility and roles are as follows:

STATEWIDE STEERING COMMITTEE:

- ◆ Reviews organizations to be admitted into the FSEC Campaign and oversees the allocation of certain undesignated funds, pursuant to statute.
- ◆ Recommends to DMS the policies and guidelines of the Campaign.

DEPARTMENT OF MANAGEMENT SERVICES:

- ◆ Supervises and governs the Campaign statewide.
- ◆ Promulgates rules.
- ◆ Issues Final Orders regarding admission of organizations to the FSECC and allocation of certain undesignated funds.

AGENCY HEAD:

- ◆ Endorses Campaign.
- ◆ Appoints Statewide Agency Coordinator.
- ◆ Ensures all internal fund raising activities are non-coercive.
- ◆ Recognizes and thanks employees.

STATEWIDE AGENCY COORDINATORS *(see page 7 for a more detailed description):*

- ◆ Appointed by Agency Head to fulfill the agency's responsibility for implementing the FSECC statewide.
- ◆ Must be given access to, and cooperation from, all divisions of the agency.
- ◆ Appoint Local Agency Coordinators.
- ◆ Serve as point person for agency's statewide payroll deduction spreadsheet (uploaded into People First).
- ◆ Monitor campaign progress and report periodically to agency head and employees statewide.
- ◆ Attend and speak at key meetings.

LOCAL AGENCY COORDINATORS *(see page 8 for a more detailed description):*

- ◆ Work closely with the local fiscal agent that serves the county in which he/she works in the day-to-day implementation of the FSECC within the local office.
- ◆ Recruit co-coordinator teams within bureaus and offices.

- ◆ Monitor progress and turn in pledge forms to the local fiscal agent.
- ◆ Report progress periodically to Statewide Agency Coordinator.
- ◆ Schedule and assure attendance of employees at any group meetings.
- ◆ Thank contributors.

CO-COORDINATOR TEAMS:

- ◆ Report to the Local Agency Coordinator.
- ◆ Conduct the campaign process within a division, bureau, program office, etc. He/she has similar responsibilities to the Local Agency Coordinator, except that it is confined to the division, bureau, or program office level.
- ◆ Assist with planning the campaign and providing the opportunity for employees to participate.
- ◆ Contact each employee personally.
- ◆ Collect all pledges from employees and turn in pledges to Local Agency Coordinator weekly.
- ◆ Schedule group meetings.
- ◆ Thank contributors.

26 FISCAL AGENT AREA UNITED WAYS:

- ◆ Overall management and fiscal responsibility for the local campaigns.
- ◆ Staff members available to help state employee coordinators in any way possible.
- ◆ Produce all materials to be used in the campaign (i.e., brochures, pledge forms, etc.).

26 LOCAL STEERING COMMITTEES:

- ◆ A group of state employees selected by local fiscal agent from among recommendations provided by interested participating organizations, if any, and approved by the Statewide Steering Committee. Local Steering Committees assist in conducting local campaigns and direct the distribution of a portion of the undesignated funds.

STATEWIDE AGENCY COORDINATOR DUTIES & RESPONSIBILITIES

The primary responsibilities of the Statewide Agency Coordinator are to:

1. **Develop a plan** to implement and conduct the Florida State Employees' Charitable Campaign (FSECC) in your agency statewide.
2. **Meet with your agency head** and significant management staff to discuss the plan and campaign strategy.
3. **Establish a network of local agency coordinators** throughout the state, as determined by the size and complexity of your agency.
4. Provide the list of your agency's **Local Agency Coordinators** to:

Beth Meredith, Statewide Fiscal Agent, United Way of Florida

e-mail: beth@uwof.org

307-B East Seventh Avenue, Tallahassee, FL 32303

phone: (850) 488-8171

5. **Serve as point person for your agency's statewide mass upload spreadsheet for employee payroll deductions**, which will be uploaded into the People First system.
6. **Promote the campaign** internally on a statewide basis through management meetings, conference calls with local agency coordinators, instructions to field administrators and supervisors, newsletters, memos, e-mail and website updates.
7. **Respond to inquiries and requests** from the local fiscal agents, managers, and employees.
8. **Solicit feedback** from your local agency coordinators regarding the conduct of the campaign.
9. **Track your agency's campaign progress** and results, and provide periodic updates to your executive management and employees statewide.

SPECIAL NOTES FOR STATEWIDE AGENCY COORDINATORS:

- The Campaign window is September 1 to December 1. Local campaigns take place within the campaign window, depending on the schedule of each local fiscal agent and their ability to coordinate the program with the local campaign chair and state agencies.*
- Employee giving through the campaign is voluntary. No coercion will be tolerated. Coordinators and managers must ensure, however, that all employees are provided the opportunity to participate through reasonable access to campaign materials, activities, and local fiscal agent briefings.*
- State employees must use the FSECC materials (pledge forms and campaign brochures) from the fiscal agent area United Way that serves the county in which the state employee works.*

LOCAL AGENCY COORDINATOR DUTIES & RESPONSIBILITIES

1. Contact the appropriate Fiscal Agent Area United Way office that serves the county in which you work, inform them of your appointment, work directly with them, and become actively involved in the campaign schedule of activities.
2. Provide any necessary assistance to the state employee Local Campaign Chair (appointed to oversee activities encompassing all state agencies in your geographical area). The local fiscal agent will be able to tell you that individual's name and phone number.
3. Select a team to assist you, each of whom will be responsible for personal solicitation of individual employees within the agency, local office, or program area. It is recommended that one solicitor per twenty (20) employees be sought. Work with the local fiscal agent to obtain the localized materials.
4. Coordinate orientation activities at your facility, and schedule and assure attendance of employees at any group meetings.
5. Assume responsibility for the collection and accounting of contributions, and turn in pledges to the appropriate local fiscal agent United Way weekly. Provide periodic updates to your agency's Statewide Coordinator.
6. Provide the Statewide Agency Coordinator feedback on the conduct of the campaign and suggestions or recommendations for enhancement of future campaigns.

SPECIAL NOTES FOR LOCAL AGENCY COORDINATORS:

- a. Giving is voluntary. No coercion will be tolerated; however, the local coordinator and/or managers must ensure that all employees are provided an opportunity to participate.*
- b. State employees must use FSECC materials from the Fiscal Agent Area United Way that serves the county in which the state employee works.*
- c. The campaign includes eight different umbrella groups plus independent unaffiliated agencies. All literature, speeches, and inducements to contribute are to be nonpartisan in nature.*
- d. For recognition of the FSECC, use of the FSECC logo is allowed and encouraged, while use of the United Way logo is not permitted.*



FSEC CAMPAIGN CONTACTS



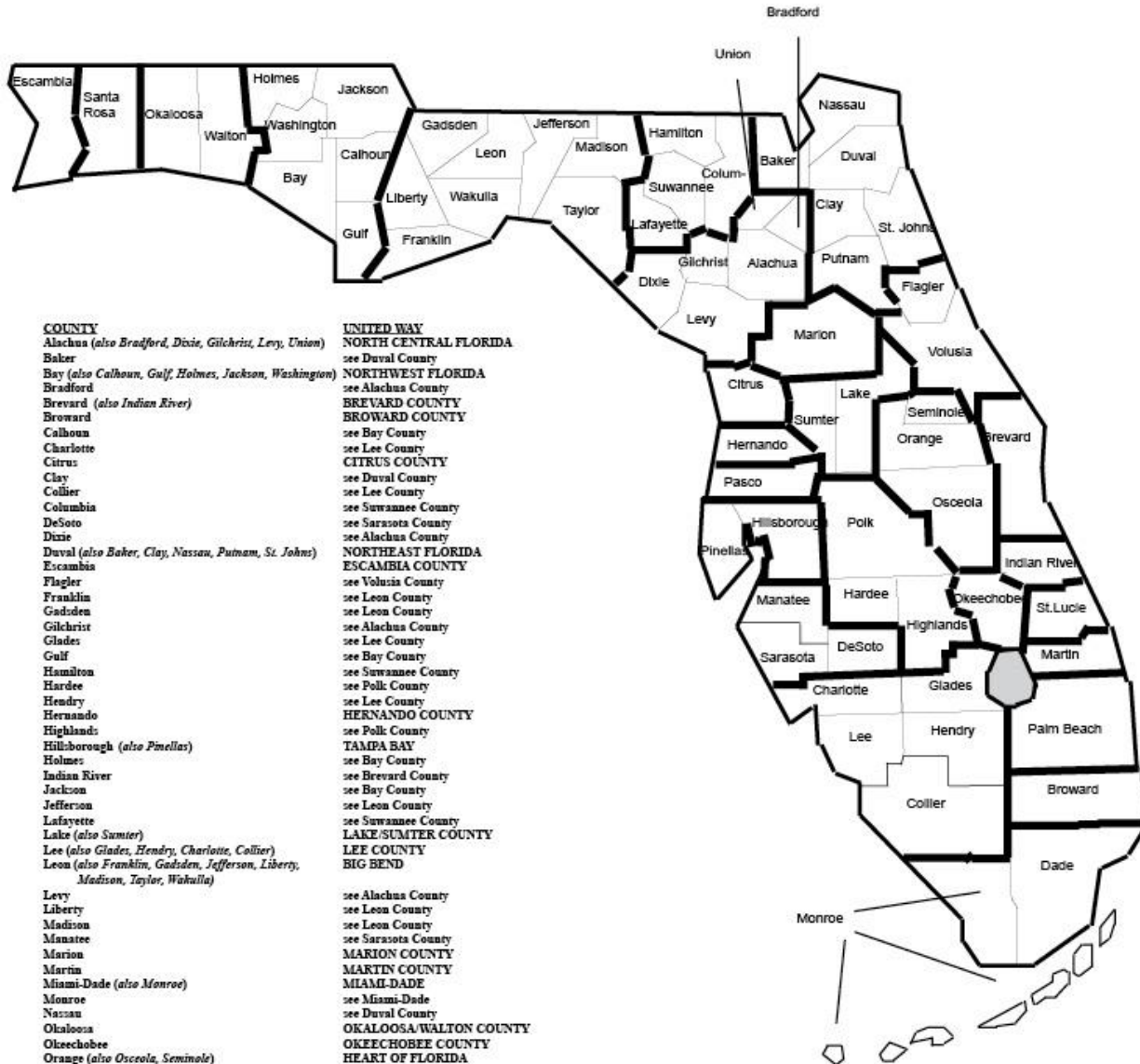
FISCAL AGENT AREA UNITED WAY CONTACTS

LOCAL FISCAL AGENT # (Payroll deduction code)	FISCAL AGENT AREA (UNITED WAY)	COUNTY(IES) COVERED	2011 CONTACT	PHONE NUMBER	E-MAIL ADDRESS
710	North Central Florida	<i>Alachua, Bradford, Dixie, Gilchrist, Levy, Union</i>	Edwin Goutier	(352) 333-0847	egoutier@unitedwayncfl.org
722	Big Bend	<i>Franklin, Gadsden, Jefferson, Leon, Liberty, Madison, Taylor, Wakulla</i>	Alison Dodson	(850) 487-2087	alison@uwbb.org
712	Brevard County	<i>Brevard, Indian River*</i>	Alecia Blattler	(321) 631-2740	ablattler@uwbrevard.org
713	Broward County	<i>Broward</i>	Celeste Abell	(954)462-4850 (x.132)	cabell@unitedwaybroward.org
730	Central Florida	<i>Hardee, Highlands, Polk</i>	Dale Stills	(863) 648-1500	Dale.stills@uwcf.org
704	Citrus County	<i>Citrus</i>	Jennifer Barber	(352) 795-5483	jennifer.barber@local.unitedway.org
702	Escambia County	<i>Escambia</i>	Ron Denson / Trista Swauger	(850) 444-7043 (850) 452-2029	cfcdir@escarosacfc.org trista@unitedwayescambia.org
728	Heart of Florida	<i>Orange, Osceola, Seminole</i>	Pia Valenciano	(407) 429-2094	Pia.valenciano@hfuw.org
706	Hernando County	<i>Hernando</i>	Kathy Jones	(352) 688-2026	uwhernando@tampabay.rr.com
749	Indian River Co. *	<i>*Brevard is fiscal agent</i>			
720	Lake/Sumter Co.	<i>Lake, Sumter</i>	Terri Kracht	(352) 787-7530	uwcampaign1@aol.com
721	Lee County	<i>Glades, Hendry, Lee, Charlotte, Collier</i>	Julie Barkley	(239) 433-2000	julie@unitedwaylee.org
724	Marion County	<i>Marion</i>	Traci Wilson-Brown	(352) 732-9696	twilson-brown@uwmc.org
725	Martin County	<i>Martin</i>	Lucy Corley	(772) 283-4800 (x. 222)	lorley@unitedwaymartincounty.org
701	Miami-Dade	<i>Miami-Dade, Monroe**</i>	Anthony Bonaventure	(305) 646-7024	bonaventurea@unitedwaymiami.org
726	Florida Keys **	<i>**Miami-Dade is fiscal agent</i>			
717	Northeast Florida	<i>Baker, Clay, Duval, Nassau, Putnam, St. Johns</i>	John Smith Jennifer Tamol	(904) 390-3272 (904) 390-3200	JohnS@uwnefl.org / jennifert@uwnefl.org
711	Northwest Florida	<i>Bay, Calhoun, Gulf, Holmes, Jackson, Washington</i>	Ron Sharpe	(850) 215-6749	rsharpe@unitedwaynwfl.org
727	Okaloosa/Walton Co.	<i>Okaloosa, Walton</i>	Bill Robinson	(850) 243-0315	bill@united-way.org
707	Okeechobee County	<i>Okeechobee</i>	Jennifer Lafferty (vol.)	(863) 801-9229	jlafferty@centerstatebank.com uwokee@gmail.com
703	Palm Beach County	<i>Palm Beach</i>	Toni Somma / Allen Kirschner	(561) 375-6676 (561) 375-6612	tonisomma@unitedwaypbc.org allenkirschner@unitedwaypbc.org
735	Pasco County	<i>Pasco</i>	David Himes	(727) 835-2026	dhimes@unitedwaypasco.org
731	St. Lucie County	<i>St. Lucie</i>	Margaret Ostman	(772) 464-5300	margaret.ostman@unitedwayslc.org
732	Santa Rosa County	<i>Santa Rosa</i>	Kendra Parson	(850) 623-4507	kendra@unitedwaysrc.org
733	Sarasota County	<i>DeSoto, Sarasota, Manatee***</i>	Nancy Ostrander	(941)366-2686 (x.308)	nancyo@uwsrq.com
716	Suwannee Valley	<i>Columbia, Hamilton, Lafayette, Suwannee</i>	Rita Dopp	(386) 752-5604	unitedway@bellsouth.net
718	Tampa Bay, Inc.	<i>Hillsborough, Pinellas</i>	Diane Sharp	(813) 274-0927	dsharp@uwtb.org
734	Volusia-Flagler Co.	<i>Flagler, Volusia</i>	Diane Olsen / Veronica Dunbar	(386) 253-0563	dolsen@unitedwayvfc.org vdunbar@unitedwayvfc.org

NOTE: State employees must use the FSECC materials from the Fiscal Agent Area United Way that serves the county in which the state employee works. The 26 United Ways listed above serve as Local Fiscal Agents in conducting the campaigns around the state.

FSEC FISCAL AGENT AREA MAP

Campaign Area Map



COUNTY

Alachua (also Bradford, Dixie, Gilchrist, Levy, Union)
 Baker
 Bay (also Calhoun, Gulf, Holmes, Jackson, Washington)
 Bradford
 Brevard (also Indian River)
 Broward
 Calhoun
 Charlotte
 Citrus
 Clay
 Collier
 Columbia
 DeSoto
 Dixie
 Duval (also Baker, Clay, Nassau, Putnam, St. Johns)
 Escambia
 Flagler
 Franklin
 Gadsden
 Gilchrist
 Glades
 Gulf
 Hamilton
 Hardee
 Hendry
 Hernando
 Highlands
 Hillsborough (also Pinellas)
 Holmes
 Indian River
 Jacksonville
 Jefferson
 Lafayette
 Lake (also Sumter)
 Lee (also Glades, Hendry, Charlotte, Collier)
 Leon (also Franklin, Gadsden, Jefferson, Liberty, Madison, Taylor, Wakulla)
 Levy
 Liberty
 Madison
 Manatee
 Marion
 Martin
 Miami-Dade (also Monroe)
 Monroe
 Nassau
 Okaloosa
 Okeechobee
 Orange (also Osceola, Seminole)
 Osceola
 Palm Beach
 Pasco
 Pinellas
 Polk (also Hardee, Highlands)
 Putnam
 St. Johns
 St. Lucie
 Santa Rosa
 Sarasota (also DeSoto, Manatee)
 Seminole
 Sumter
 Suwannee (also Columbia, Hamilton, Lafayette)
 Taylor
 Union
 Volusia (also Flagler)
 Wakulla
 Walton
 Washington

UNITED WAY

NORTH CENTRAL FLORIDA
 see Duval County
NORTHWEST FLORIDA
 see Alachua County
BREVARD COUNTY
BROWARD COUNTY
 see Bay County
CITRUS COUNTY
 see Duval County
 see Lee County
 see Suwannee County
 see Sarasota County
 see Alachua County
NORTHEAST FLORIDA
ESCAMBIA COUNTY
 see Volusia County
 see Leon County
 see Leon County
 see Alachua County
 see Lee County
 see Bay County
 see Suwannee County
 see Polk County
 see Lee County
HERNANDO COUNTY
 see Polk County
TAMPA BAY
 see Bay County
 see Brevard County
 see Bay County
 see Leon County
 see Suwannee County
LAKE/SUMTER COUNTY
LEE COUNTY
BIG BEND
 see Alachua County
 see Leon County
 see Leon County
 see Sarasota County
MARION COUNTY
MARTIN COUNTY
MIAMI-DADE
 see Miami-Dade
 see Duval County
OKALOOSA-WALTON COUNTY
OKEECHOBEE COUNTY
HEART OF FLORIDA
 see Orange County
PALM BEACH COUNTY
PASCO COUNTY
 see Hillsborough County
CENTRAL FLORIDA
 see Duval County
ST. LUCIE COUNTY
SANTA ROSA COUNTY
SARASOTA COUNTY
 see Orange County
 see Lake County
SUWANNEE VALLEY
 see Leon County
 see Alachua County
VOLUSIA-FLAGLER COUNTY
 see Leon County
 see Okaloosa County
 see Bay County

NOTE: Of Florida's 67 counties, all are included in the FSEC Campaign, conducted by 26 Fiscal Agent Area United Ways. Participating counties are shown on the left, with the corresponding United Way that serves as the Local Fiscal Agent for that county(ies) in the right column.

26 FISCAL AGENT AREA UNITED WAY CONTACTS

BIG BEND

Franklin/Gadsden/Jefferson/Leon/
Liberty/ Madison/ Taylor/Wakulla

Alison Dodson

United Way of the Big Bend
307 E. 7th Avenue
Tallahassee, FL 32303
(850) 487-2087
FAX #: (850) 414-0852

BREVARD COUNTY

Brevard/Indian River

Alecia Blattler

United Way of Brevard County
937 Dixon Blvd.
Cocoa, FL 32922-6806
(321) 631-2740
FAX #: (321) 631-2007

BROWARD COUNTY

Celeste Abell

United Way of Broward County
1300 South Andrews Ave.
Ft. Lauderdale, FL 33316
(954) 462-4850 (x. 132)
FAX #: (954) 462-4877

CENTRAL FLORIDA

Hardee/Highlands/Polk

Dale Stills

United Way of Central Florida
P. O. Box 1357
Highland City, FL 33846
(863) 648-1500
FAX #: (863) 648-1535

CITRUS COUNTY

Jennifer Barber / John Marmish

United Way of Citrus County
1205 N.E. 5th Street, Suite A
Crystal River, FL 34429
(352) 795-5483
FAX #: (352) 795-5480

ESCAMBIA COUNTY

Ron Denson

United Way of Escambia County
1301 W. Government St.
Pensacola, FL 32501
(850) 444-7043
FAX #: (850) 444-7117

HEART OF FLORIDA

Orange/Osceola/Seminole

Pia Valenciano

Heart of Florida United Way
1940 Traylor Blvd.
Orlando, FL 32804
(407) 429-2094
FAX #: (407) 835-1959

HERNANDO COUNTY

Kathy Jones

United Way of Hernando County
4030 Commercial Way
Spring Hill, FL 34606
(352) 688-2026
FAX #: (352) 688-8336

LAKE/SUMTER COUNTY

Terri Kracht

United Way of Lake & Sumter Counties
P. O. Box 490270
Leesburg, FL 34749
(352) 787-7530
FAX #: (352) 787-6048

LEE COUNTY

Glades/Hendry/Lee/Charlotte/Collier

Julie Barkley

United Way of Lee County
7273 Concourse Drive
Ft. Myers, FL 33908
(239) 433-2000
FAX #: (239) 433-4380

MARION COUNTY

Traci Wilson-Brown

United Way of Marion County
P. O. Box 1086
Ocala, FL 34478
(352) 732-9696
FAX #: (352) 732-9608

MARTIN COUNTY

Lucy Corley

United Way of Martin County
P. O. Box 362
Stuart, FL 34995
(772) 283-4800 (x. 222)
FAX #: (772) 220-7771

MIAMI-DADE

Miami-Dade/Monroe

Anthony Bonaventure

United Way of Miami-Dade
The Ansin Building
3250 SW Third Avenue
Miami, FL 33129-2712
(305) 646-7024
FAX #: (305) 646-7193

NORTH CENTRAL FLORIDA

Alachua/Bradford/Dixie/
Gilchrist/Levy/Union

Edwin Goutier

United Way of North Central Florida
6031 NW 1st Place
Gainesville, FL 32607-2025
(352) 333-0847
FAX #: (352) 331-2111

NORTHEAST FLORIDA

Baker/Clay/Duval/Nassau/Putnam/St. Johns

John Smith

United Way of Northeast Florida
P. O. Box 41428
Jacksonville, FL 32203-1428
(904) 390-3272
FAX #: (904) 390-3251

NORTHWEST FLORIDA

Bay/Calhoun/Gulf/Holmes/
Jackson/Washington

Ron Sharpe

United Way of Northwest Florida
P. O. Box 586
Panama City, FL 32402
(850) 215-6749
FAX #: (850) 784-2569

OKALOOSA/WALTON COUNTY

Okaloosa/Walton

Bill Robinson

United Way of Okaloosa-Walton Co.
112 Tupelo Avenue
Ft. Walton Beach, FL 32548
(850) 243-0315
FAX #: (850) 243-6625

OKEECHOBEE COUNTY

Jennifer Lafferty

(c/o Center State Bank)
Volunteer, UW of Okeechobee County
P. O. Box 7
Okeechobee, FL 34973
(863) 801-9229

PALM BEACH COUNTY

Toni Somma / Allen Kirschner

United Way of Palm Beach Co., Inc.
2600 Quantum Blvd.
Boynton Beach, FL 33426
(561) 375-6676 (Toni)
(561) 375-6612 (Allen)
FAX #: (561) 375-6666

PASCO COUNTY

David Himes

United Way of Pasco County
P. O. Box 609
Pt. Richey, FL 34673-0609
(727) 835-2026
FAX #: (727) 845-3032

ST. LUCIE COUNTY

Margaret Ostman

United Way of St. Lucie County
4800 South US #1
Ft. Pierce, FL 34982
(772) 464-5300
FAX #: (772) 464-7805

SANTA ROSA COUNTY

Kendra Parson

United Way of Santa Rosa County
P. O. Box 284
Milton, FL 32570
(850) 623-4507
FAX #: (850) 626-9584

SARASOTA COUNTY

DeSoto/Sarasota/Manatee

Nancy Ostrander

United Way of Sarasota County
1445 2nd Street
Sarasota, FL 34236
(941) 366-2686 (x. 233)
FAX #: (941) 365-4368

SUWANNEE VALLEY

Columbia/Hamilton/Lafayette/Suwannee

Rita Dopp

United Way of Suwannee Valley, Inc.
325 N.E. Hernando Ave., Suite 102
Lake City, FL 32055-4015
(386) 752-5604
FAX #: (386) 752-0105

TAMPA BAY

Hillsborough/Pinellas

Diane Sharp

United Way of Tampa Bay, Inc.
5201 W. Kennedy Blvd., Suite 600
Tampa, FL 33609
(813) 274-0927
FAX: (813) 228-9549

VOLUSIA-FLAGLER COUNTIES

Volusia/Flagler

Diane Olsen / Veronica Dunbar

United Way of Volusia-Flagler Counties
3747 W. Int'l Speedway Blvd.
Daytona Beach, FL 32124
(386) 253-0563
FAX #: (386) 253-9517

LOCAL FISCAL AGENT CODES & COUNTY CODES

26 LOCAL FISCAL AGENT / PAYROLL DEDUCTION CODES:

COUNTY CODES:

Code #:	United Way:	Code #:	County:	Code #:	County
701	Miami-Dade	01	Alachua	35	Lake
702	Escambia County	02	Baker	36	Lee
703	Palm Beach County	03	Bay	37	Leon
704	Citrus County	04	Bradford	38	Levy
706	Hernando County	05	Brevard	39	Liberty
707	Okeechobee County	06	Broward	40	Madison
710	North Central Florida	07	Calhoun	41	Manatee
711	Northwest Florida	08	Charlotte	42	Marion
712	Brevard County	09	Citrus	43	Martin
713	Broward County	10	Clay	44	Monroe
714	Charlotte County	11	Collier	45	Nassau
715	Collier County	12	Columbia	46	Okaloosa
716	Suwannee Valley	13	Miami-Dade	47	Okeechobee
717	Northeast Florida	14	Desoto	48	Orange
718	Tampa Bay	15	Dixie	49	Osceola
719	Indian River County	16	Duval	50	Palm Beach
720	Lake/Sumter County	17	Escambia	51	Pasco
721	Lee County	18	Flagler	52	Pinellas
722	Big Bend	19	Franklin	53	Polk
723	Manatee County	20	Gadsden	54	Putnam
724	Marion County	21	Gilchrist	55	St. Johns
725	Martin County	22	Glades	56	St. Lucie
726	Monroe County	23	Gulf	57	Santa Rosa
727	Okaloosa/Walton Co.	24	Hamilton	58	Sarasota
728	Heart of Florida	25	Hardee	59	Seminole
730	Central Florida	26	Hendry	60	Sumter
731	St. Lucie County	27	Hernando	61	Suwannee
732	Santa Rosa County	28	Highlands	62	Taylor
733	Sarasota County	29	Hillsborough	63	Union
734	Volusia County	30	Holmes	64	Volusia
735	Pasco County	31	Indian River	65	Wakulla
		32	Jackson	66	Walton
		33	Jefferson	67	Washington
		34	Lafayette		

COUNTY DESIGNATION: The 67 county code numbers listed above are also listed in each local FSECC brochure. *If an employee wishes to designate his/her gift to a specific county and enters a county code number on the pledge form, no further charity designations from the local brochure can be made.* The employee's entire contribution will be directed to the local fiscal agent that serves that county. Such contributions will be treated as undesignated funds contributed to the FSECC.

2011 STATEWIDE AGENCY COORDINATORS

Agency Abbrev.	STATE AGENCY/DEPARTMENT	2011 COORDINATOR	PHONE	EMAIL
*	DOAH Administrative Hearings, Division of	Loretta Sloan	850-488-9675 (x.221)	loretta_sloan@doah.state.fl.us
*	DACS Agriculture & Consumer Services	Dexter Harris	850-617-7707	dexter.harris@freshfromflorida.com
*	AG Auditor General	Terri Lappin	850-487-9190	terrilappin@aud.state.fl.us
*	DBPR Business & Professional Regulation	Sue Sparks	850-921-0963	susan.sparks@dbpr.state.fl.us
*	DCF Children and Families	Doria Moody	850-488-7852	doria_moody@dcf.state.fl.us
*	CIT Citrus	Lana Shulnes	863-537-3975	lshulnes@citrus.state.fl.us
	DCA Community Affairs	James Miller	850-922-1734	james.miller@dca.state.fl.us
*	- Div. of Emergency Management	Mindy Dowling	850-410-1268	mindy.dowling@em.myflorida.com
*	DC Corrections	Pat Finan	850-717-3222	finan.patrick@mail.dc.state.fl.us
*	DOE Education	Nyla Benjamin	850-245-7830	nyla.benjamin@fldoe.org
*	DEA Elder Affairs	Whitney Hults	850-414-2318	hultsw@elderaffairs.org
	DEP Environmental Protection	Henry Barnet	850-245-2852	henry.barnet@dep.state.fl.us
	DEP Environmental Protection	Shawn Boston	850-245-2851	shawn.boston@dep.state.fl.us
	DFS Financial Services (CFO)	Stephanie Iliff	850-413-2014	stephanie.iliff@myfloridacfo.com
	- Insurance Regulation, Office of	Stephanie Iliff	850-413-2014	stephanie.iliff@myfloridacfo.com
	- Financial Regulation, Office of	Flora Beal	850-410-9709	flora.beal@flofr.com
	FWC Fish & Wildlife Conserv. Commission	Lisa Davis Zullo	850-922-4330	lisa.zullo@myfwc.com
	FSDB FL School for the Deaf & the Blind	Ruth Anderchin	904-827-2318	anderchinr@fsdb.k12.fl.us
*	EOG Governor's Office	Rachel Goodson	850-488-5152	rachel.goodson@eog.myflorida.com
	- Enterprise Info. Technology, Agency for	Rachel Goodson	850-488-5152	rachel.goodson@eog.myflorida.com
*	GAL Guardian Ad Litem	Sheri Wilkes Cape	850-922-7204	sheri.cape@gal.fl.gov
	DOH Health	Richard Solze	850-245-4205	richard_solze@doh.state.fl.us
	AHCA Health Care Administration, Agency for	Emilia Murphy	850-412-3874	emilia.murphy@ahca.myflorida.com
	HSMV Highway Safety and Motor Vehicles	Deana Metcalf	850-617-3400	deanametcalf@flhsmv.gov
*	JAC Justice Administrative Commission	Bobbie Chappell	850-488-2415 (x249)	bobbiec@justiceadmin.org
	DJJ Juvenile Justice	Mary Eubanks	850-921-6344	mary.eubanks@djj.state.fl.us
*	FDLE Law Enforcement	Ron Draa	850-410-7020	RonaldDraa@fdle.state.fl.us
*	DLA Legal Affairs (Attorney General)	Betsy Seidel	850-414-3365	betsy.seidel@myfloridalegal.com
	LOT Lottery	Becky Mueller	850-487-7714	muellerr@flalottery.com
	DMS Management Services	Meredith Brock	850-487-3977	meredith.brock@dms.myflorida.com
	DMS Management Services	Mailea Adams	850-413-9503	mailea.adams@dms.myflorida.com
	DMA Military Affairs	Erin Lewis	904-823-0403	erin.lewis3@us.army.mil
NEW	NSRC Northwood Shared Resource Center	Pat Chandler	850-414-6764	patricia_chandler@nsrc.myflorida.com
	FPC Parole Commission, Florida	Bonnie Floyd	850-488-3417	bonniefloyd@fpc.state.fl.us
*	APD Persons with Disabilities, Agency for	Calvin Sloan	850-488-4235	calvin_sloan@apd.state.fl.us
*	PSC Public Service Commission	Bev DeMello	850-413-6107	bdemello@psc.state.fl.us
*	REV Revenue	Shannon Baker	850-921-2636	bakersha@dor.state.fl.us
NEW	SSRC Southwood Shared Resource Center	Dana Parker	850-488-9399	dana.parker@ssrc.myflorida.com
	DOS State (Secretary of State)	Mark Ard	850-245-6268	mard@dos.state.fl.us
*	SBA State Board of Administration	Peggy Prophet	850-413-1264	peggy.prophet@sbafla.com
*	DOT Transportation	Tim Lattner	850-410-5656	tim.lattner@dot.state.fl.us
*	DVA Veterans' Affairs	Eric Pippenger	727-518-3202 x.5541	PippengerE@fdva.state.fl.us
*	AWI Workforce Innovation, Agency for	Shirley Bull	850-245-7118	shirley.bull@flaawi.com

NEW = A new state agency as of 2011.

NOTE: Coordinators who have an asterisk (*) by their name are returning as their agency's coordinator for 2011.

2011 FSECC STATEWIDE STEERING COMMITTEE MEMBERS

Sharon Larson, Chair
Department of Management Services
(appointed by Secretary of DMS)
(term expires: 12/2012)

Major Leroy Smith
Department of Highway Safety
& Motor Vehicles
(appointed by Secretary of DMS)
(term expires: 12/2013)

Gwen Worlds
Department of Agriculture
& Consumer Services
(appointed by Agriculture Commissioner)
(term expires: 12/2014)

Vacant
(appointed by Agriculture Commissioner)
(term expires: 12/2013)

Jim Varnado
Attorney General's Office
(appointed by Attorney General)
(term expires: 12/2011)

Linh Trang
Attorney General's Office
(appointed by Attorney General)
(term expires: 12/2011)

Robert Tornillo
Department of Financial Services
(appointed by Chief Financial Officer)
(term expires: 12/2012)

Shirley Bull
Agency for Workforce Innovation
(appointed by Chief Financial Officer)
(term expires: 12/2014)

Vacant
(appointed by the Governor)
(term expires: 12/2014)

STATEWIDE FISCAL AGENT AND UMBRELLA GROUP REPRESENTATIVES

Statewide Fiscal Agent

Contact: Beth Meredith
United Way of Florida
307-B East Seventh Avenue
Tallahassee, FL 32303
(850) 488-8171 (direct line)
e-mail: beth@uwof.org

Florida's United Ways ensure that your dollars are used effectively and efficiently. Funds contributed by state employees are used in their communities to solve local problems. Member agencies work year-round to prevent family violence, help victims of drug abuse, attack illiteracy, alleviate hunger and homelessness, assist the elderly, and prepare our young people for the future. United Way raises money for local member agencies, so those agencies can concentrate on what they do best ... helping to build strong, caring communities.

Community Health Charities of Florida (CHC-FL):

(For funds designations)	(Campaign contact person)
Gwen Cooper	Ginny Lioon
CHC-FL	CHC-FL
3333 W. Pensacola St.	3333 W. Pensacola St.
Ste. 240, Bldg. 200	Ste. 240, Bldg. 200
Tallahassee, FL 32304	Tallahassee, FL 32304
(850) 597-7745	(850) 597-7745
FAX: (850) 597-7781	FAX: (850) 597-7781
e-mail: gcooper@healthcharitiesfla.org	e-mail: glioon@healthcharitiesfla.org

Community Health Charities of Florida is a partnership of 60 of Florida's premiere health agencies that have joined together to improve the lives of people affected by a disability or chronic disease. Our agencies provide medical research, patient, family and social services and public and professional education in every community throughout Florida.

Check out our newest interactive tool: Health Matters at Work™ (www.healthmattersatwork.org) a comprehensive web and workplace health initiative that includes hundreds of local and national resources to help deal with chronic diseases. Our program is complete with a tool box of disease management, prevention resources and strategies that you can use everyday; including a podcast library, webinar replays and workplace based health programs. Health Matters at Work™ is a great resource for state employees interested in managing their health.

Funds contributed by state employees are distributed locally with the exception of dollars designated specifically to a research only group; those dollars are allocated to specific research projects resulting in new treatments and services available locally. Please visit our website, www.florida.healthcharities.org and/or contact us to speak at any of your FSECC events.

America's Charities:

(For funds designations)	(Campaign contact person)
Ruth Owens	Roseanne Wark, Regional Mgr
America's Charities	America's Charities
14150 Newbrook Dr., #110	14150 Newbrook Dr., #110
Chantilly, VA 20151	Chantilly, VA 20151
1-800-458-9505	1-800-458-9505
FAX: (703) 222-3867	FAX: (703) 222-3867
e-mail: rowens@charities.org	e-mail: rwark@charities.org

Choosing to give will help the hungry, the homeless and children with life-threatening illness through our member agencies. America's Charities is a 30 year tradition of giving and caring. Our FSECC approved 42 member charities serve Florida by meeting community needs through member charity services impacting health, human service, education, human and civil rights, and the environment. More information with links to all our charities can be found on our website: www.charities.org

EarthShare:

(For funds designations)	(Campaign contact person)
EarthShare	Barton Cooper
Dept. 4011	EarthShare
Washington, DC 20042-4011	3333 W. Pensacola St., #240
	Tallahassee, FL 32304
(240) 333-0300 (x. 12)	(850) 933-9205
FAX: (240) 333-0301	FAX: (850) 597-7781
e-mail: leslie@earthshare.org	e-mail: barton@earthshare.org

EarthShare unites Florida, national and international environmental organizations under one banner for workplace fund drives. Our members have protected Florida and the world's natural resources for decades, some for over 100 years. They battle pollution, promote recycling, protect endangered species and preserve natural resources everywhere. Making a difference in our environment is easy with EarthShare. Every designation to EarthShare is shared among the member groups, so with One Gift, you can help save the Manatee, the Everglades and the Amazon. Donors may also designate contributions to the organizations of their choice to support their favorite causes, whether it's protecting our National Parks or saving endangered species. We only have one environment, now is the time to make good choices that will help protect the world around us.

Global Impact:

(For funds designations)	(Campaign contact person)
Global Impact	Tom DeCoursey, Director of Public Sector Campaigns
P. O. Box 409616	Global Impact
Atlanta, GA 30384-9616	P. O. Box 10,
e-mail:	Red Hook, NY 12571
campaigns@charity.org	(845) 757-2252
	FAX: (845) 757-2250
	e-mail: tom.decoursey@charity.org

At Global Impact, our efforts are focused on making a tangible difference in the lives of the world's most vulnerable citizens.

Founded in 1956, Global Impact represents more than 50 of the most respected U.S.-based international development and relief charities. Every year, Global Impact charities touch over 400 million lives in virtually every developing country through disaster relief, education, health training and economic programs that promote self-sufficiency. Global Impact charities get results by providing the tools for people to help themselves.

Information on Global Impact and our member charities can be found at www.charity.org.

Neighbor To Nation:

(For funds designations)	(Campaign contact person)
Neighbor To Nation	Martial Dedegbe
c/o SunTrust Bank	Neighbor To Nation
P. O. Box 79991	7620 Little River Tpk, #600
Baltimore, MD 21279-0991	Annandale, VA 22003
	(877) 841-6839
	FAX: (703) 542-3748
	e-mail:
	campaign@neighbortonation.org

Neighbor To Nation's participating charities serve people of all ages, genders, and races in communities in Florida as well as throughout the country and overseas. These charities provide vital disaster relief, search for treatments and cures for debilitating medical conditions, fight against hunger, support economic development and self-sufficiency programs, and provide counseling, education and training. People in deed serving people in need.

Your generous donations enable these charities to continue to make our world a better place in neighborhoods close to home and far away. For more information on our participating charities, visit us at www.neighbortonation.org.

Independent Charities of America (ICA):

(For funds designations)	(Campaign contact person)
ICA	Catherine Miller
1100 Larkspur Landing Circle	ICA
Suite 340	1100 Larkspur Landing Cir, #340
Larkspur, CA 94939	Larkspur, CA 94939
1-800-477-0733	(415) 925-2600 (x. 124)
(415) 925-2600	FAX: (415) 925-2650
FAX: (415) 925-2650	e-mail: cmiller@maguireinc.com

Feeding the hungry. Sheltering the homeless. Protecting the children. Healing the sick. Advancing research. Preserving the environment and conserving our natural resources. Delivering disaster relief around the world. Educating the young here at home.


Your donation provides immediate aid to those in need and helps make ready assistance for the future. Join with America's finest independent charities working together with you to share – the American way.

Partners for a Better World:

(For funds designations)	(Campaign contact person)
Partners for a Better World	Leah Hamilton
10 Chestnut St	Partners for a Better World
Salem, MA 01970	10 Chestnut St
	Salem, MA 01970
(866) 672-1097	(978) 594-0404
(978) 607-0001	FAX: (978) 236-7272:
FAX: (978) 236-7272	info@partnersforabetterworld.org

Who hasn't dreamed of a better world? Some may see it as an impossible dream. But we believe the dream can be realized through hard work, generosity and partnership.

Partners for a Better World is a federation of not-for-profit organizations that feed the hungry, help the sick and vulnerable, protect the environment, bring the arts to schools and communities, and work in countless other ways to make our world a better place. The federation connects these groups to individuals who want to help, by reaching people where they work through workplace giving campaigns. We believe these fund drives are powerful, because the payroll deductions that characterize them allow even people with modest incomes to be partners in realizing the dream of a better world.



OTHER HELPFUL INFORMATION

GIVING TO THE FSEC CAMPAIGN

If you have contributed to the FSECC or perhaps even helped with the campaign in the past, you are probably familiar with the options available to contributors:

PAYROLL DEDUCTION: All employees, *including OPS employees*, have the option of having their contribution deducted from their paycheck over the next calendar year. This is the customary option, intended to help employees manage gift giving within their budget. Also, we find that people are able to give significantly more through payroll deductions, instead of a one-time contribution.

CASH OR CHECKS: Employees who prefer not to authorize payroll deductions have the option of giving by cash or check. However, special care should be given to ensure these types of contributions are promptly transferred to the local fiscal agent for handling.

All three of the above methods are provided for on the pledge form. All checks should be made out to the "FSECC".

DESIGNATION OPTIONS: The donor has the option of designating his/her contribution to any of the charitable organizations listed in their local FSECC brochure. Designations will be directed to those charities, less the proportionate cost of running the campaign. Designation is encouraged, since it gives employees a more direct say in how their contributions are used. However, designations are not required and the matter is left entirely to the individual contributor's choice.

As an alternative to designating specific charities, employees may designate one specific Florida county (*see list of county code numbers on page 14*). However, if a county code is entered on the pledge form, the employee's entire contribution will be directed to the local fiscal agent that serves that county and will be treated as undesignated funds contributed to the FSECC. This means that such contributions will be distributed to eligible participating charities within the fiscal agent area in which the specified county is located.

UNDESIGNATED CONTRIBUTIONS: All contributions that are not earmarked for a particular charity participating in the campaign will be "undesignated funds" that will be distributed to eligible participating charities by the Statewide Steering Committee or by the local steering committees in accordance with FSECC statute and rules.

FSEC CAMPAIGN PLEDGE FORM

C05424
5th Proof - 7-9-09
Ink: Black & ProBlue

Florida State Employees' Charitable Campaign (FSECC)



A

PART 1: FISCAL AGENT

Agency: County Name: Fiscal Agent Code:
 Last Name: Employee No.:
 First Name: M.I.:
 Division:
 Bureau:
 Section:
 Subsection:
 Org Level 6:
 Building Name: Room Number:
 Email Address: @

B

I wish to participate in the FSECC and pay my gift by the following method (please choose one of the following):

PAYROLL DEDUCTION (Minimum deduction per pay period is \$2.00 for monthly employees and \$1.00 for biweekly employees)
Monthly Employees \$ x 12 = \$ (Total Pledge)
 NOTE: You must insert the monthly figure from above into the blank authorization space (blue box) in Part 2 of this form.
Biweekly Employees \$ x 26 = \$ (Total Pledge)
 NOTE: You must insert the biweekly figure from above into the blank authorization space (blue box) in Part 2 of this form.
 PERSONAL CHECK for a Total Pledge of \$ (Please Make Payable to the FSECC)
 CASH CONTRIBUTION for a Total Pledge of \$

C

ALL CONTRIBUTORS MAY DESIGNATE A MINIMUM ANNUAL AMOUNT OF \$5.00 PER PARTICIPATING CHARITY. THE TOTAL OF YOUR DESIGNATIONS BELOW MUST MATCH YOUR TOTAL PLEDGE ABOVE. SEE FSECC BROCHURE FOR CHARITY CODES.

Charity Code	Annual Amount	Charity Code	Annual Amount	Charity Code	Annual Amount	Charity Code	Annual Amount
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>

D

E

(Contributor's Signature) _____ (Date) _____
 County Designation (Optional, if you have NOT designated a charity above.): See FSECC brochure for the 2 digit code.
(Separate at Part 2)

PART 2: PAYROLL OFFICE

Agency: County Name: Fiscal Agent Code:
 Last Name: Employee No.:
 First Name: M.I.:
 Division:
 Bureau:

F

I authorize the State of Florida to deduct the amount of \$ for each applicable pay period in the coming calendar year, beginning in January and ending in December, for a total annual amount of \$

(Contributor's Signature) _____ (Date) _____



INSTRUCTIONS:

- A. MAKE A COPY FOR THE EMPLOYEE FOR HIS/HER RECORDS IF REQUESTED**
- B. GIVING OPTIONS:** There are three giving options (payroll deduction, personal check and cash contribution).
- C. MINIMUM PAYROLL DEDUCTION:** The minimum payroll deduction amounts are \$2.00 for employees who are paid monthly, and to \$1.00 for employees who are paid bi-weekly.
- D. DESIGNATION BOXES:** There are four opportunities to designate to any of the participating charities, as listed in your local FSECC brochure. The minimum annual designation is \$5.00 per charitable organization to help keep processing costs from surpassing amounts of designations.
- E. COUNTY DESIGNATION BOX:** (Optional, if you have NOT designated a charity.) This box is not pre-printed. If the contributor utilizes the county designation option, no further charity designations from the brochure can be made.
- F. PAYROLL DEDUCTION AUTHORIZATION:** Payroll deduction contributors MUST write-in the amount per pay period that is to be taken out of his/her paycheck in the blue box in Part 2, as well as the total annual amount in the black box in Part 2. The form must also be signed at the bottom of Part 2 for payroll deduction contributions.

PLEDGE FORM - CONTINUED

PAYROLL DEDUCTION PAPER TRAIL:

GIVER
2 part pledge form:

PART 1 to:
LOCAL FISCAL AGENT

MONEY DISTRIBUTED
- by local fiscal agents,
based on donors' wishes

PART 2 OF FORM to:
STATEWIDE AGENCY COORDINATOR

**Payroll deductions gifts entered into your agency's
statewide MASS UPLOAD SPREADSHEET**

**Statewide spreadsheet emailed to DMS staff by
Deadline; DMS uploads payroll deductions into People First**

GUIDELINES FOR VARIOUS FSECC FUNDRAISING ACTIVITIES

Several questions have arisen regarding the proper approach to the items listed below. As the fiscal agent, we offer the following guidelines. These are simply guidelines. Coordinators should always check with their agency's general counsel's office re: whether or not – based on their specific ethics policy – certain fundraisers are acceptable.

- **Fundraising Activities with For-Profit Vendors in State Facilities** – A very popular fundraising activity is to have a for-profit organization come to the state office, employees buy items, and a portion of the proceeds go to their department's FSECC total. The agreement with the vendor to do so should be coordinated through the local Fiscal Agent office. State employees/coordinators have no authority to contract with or enter into an agreement with a for-profit vendor for these kinds of activities. As long as the local fiscal agent is willing to make the arrangements with the vendor, it is permissible to hold it in state buildings as part of the FSECC. Of course, the activity can be undertaken only at the request and permission of the agency head or designee. Since the local fiscal agent is the sponsor of the activity, the competitive bidding process that pertains to state offices does not apply.

If your fundraising event will take place on state property that is managed by the DMS Division of Real Estate Development and Management, please be sure the event adheres to the following three guidelines:

1. The fundraising event will benefit the FSECC, not a specific charitable organization.
2. The fundraising event has been approved by the agency head for participation by employees.
3. The fundraising event meets all the requirements of Rule 60L-39.009, F.A.C.

- **Silent Auctions** – Another successful fundraising activity utilized by state coordinators is silent auctions, in which various items are auctioned off with the proceeds being counted toward that agency's FSECC total funds raised (not a specific charity or charities). There are no limitations of which we are aware regarding the conduct of silent auctions. However, if the donor of the silent auction item wishes to receive a tax deduction, the local fiscal agent can arrange for a tax-deductible donation receipt for tax purposes. The purchaser generally would not receive a tax deduction.
- **Door Prizes/Giveaways** – A state employee may win items of varying value as a result of his/her attendance at an event. Other door prize winners could come from people who win contests, or the first 10 people who come in the door, for example. The primary characteristic is that the employee cannot be required to pay anything to win a door prize or giveaway. If the prize is from a lobbyist or principal, it cannot be accepted by either a reporting individual or procurement employee. Coordinators should always check with their agency's general counsel's office re: whether or not – based on their specific ethics policy – certain fundraisers are acceptable. Door prizes and giveaways are not conducted in the same way as drawings/raffles, as described below.

- **Drawings/Raffles** – A raffle/drawing cannot appropriately be conducted by a state agency other than the Department of Lottery. A raffle/drawing also cannot be conducted by a for-profit corporation. Therefore, if an agency participating in the FSECC has an item that needs to be given away, the local fiscal agent, as a nonprofit corporation, would have to conduct the drawing for the agency, with proceeds going to the FSECC through the United Way as FSECC fiscal agent. The proceeds are then credited to the particular state agency as part of its overall charitable goal (not a designation to any particular charity or charities). The stipulations governing this procedure make it necessary for the donors to donate the merchandise to United Way in the fiscal agent area in which the drawing is being held, and it is that local fiscal agent who must send a notice to the agency coordinator offering the opportunity for their employees to participate in the drawing. Notification of the drawing must come from the local United Way office, and coordinators can pass on that notification to the rest of the employees. This is a decision for each local fiscal agent to make – whether or not it wishes to pass these drawing opportunities along to state agencies. For example, the United Way of the Big Bend will do so if the item is valuable and there is benefit to be gained by using a drawing rather than one of the tools mentioned above. United Way staff, as the nonprofit fiscal agent, must be present at the drawing, and must conduct the drawing. Coordinators should always check with their agency’s general counsel’s office re: whether or not – based on their specific ethics policy – certain fundraisers are acceptable.

Revised and approved by DMS, June 28, 2011.



**STATE OF FLORIDA
COMMISSION ON ETHICS OPINION**

**RENDERED THE 2ND DAY OF
AUGUST, 2006**

EXECUTIVE BRANCH LOBBYING

CORPORATE GIFTS AND DONATIONS TO THE UNITED WAY FOR THE ANNUAL FLORIDA STATE EMPLOYEES' CHARITABLE CAMPAIGN

To: Ms. Beth Meredith, Chief Operating Officer, United Way of Florida (Tallahassee)

SUMMARY:

Section 112.3215(6)(a), Florida Statutes, prohibits lobbyists and principals from making, and agency officials and employees from accepting, any indirect expenditures. However, where corporations that are registered as principals of Executive Branch agency lobbyists make donations to the United Way of Florida and its local fiscal agents, which are then used to generate interest and participation in the Florida State Employees' Charitable Campaign among officers and employees of State agencies, those prizes and donations are not indirect expenditures prohibited by Section 112.3215(6)(a), Florida Statutes, as amended by Chapter 2005-359, Laws of Florida, and can be accepted by agency officers and employees.

QUESTION:

May companies that employ or retain lobbyists who are registered to lobby Executive Branch agencies sponsor FSECC-related events or donate prizes through the United Way and its local fiscal agents to be used in FSECC giveaways, silent auctions, and other promotions without violating Section 112.3215(6)(a), Florida Statutes, as amended by Chapter 2005-359, Laws of Florida?

Under the circumstances presented, your question is answered in the affirmative.

This opinion is sought on behalf of the United Way of Florida, which contracts with the Department of Management Services to serve as the statewide fiscal agent, as well as by the 40+ Statewide Agency Coordinators and the 27 local United Way fiscal agents who conduct the Florida State Employees' Charitable Campaign (FSECC) around Florida.

You explain that the local fiscal agents for the FSEC Campaign work closely with State agency coordinators to coordinate and conduct FSECC-related fundraising events, many of which involve the donation of prizes from local companies. Prizes donated through United Way fiscal agents might range from dinner for two at a local restaurant, a gift basket, a trip for two, movie passes, etc. In addition, some companies sponsor luncheons for FSECC-related events. You question whether companies that employ or retain lobbyists to lobby Executive Branch agencies may continue to sponsor FSECC events and donate prizes to the United Way, which uses such sponsorships and prizes to generate enthusiasm and participation in the FSECC.

Section 112.3125(6)(a), Florida Statutes, as amended by Chapter 2005-359, Laws of Florida, provides:

Notwithstanding s. 112.3148, s. 112.3149, or any other provision of law to the contrary, no lobbyist or principal shall make, directly or indirectly, and no agency official, member, or employee shall knowingly accept, directly or indirectly, any expenditure.

Section 112.3215(1)(d), Florida Statutes, as amended by Chapters 2005-359 and 2006-275, Laws of Florida, defines "expenditure" to mean

a payment, distribution, loan, advance, reimbursement, deposit, or anything of value made by a lobbyist or principal for the purpose of lobbying. The term 'expenditure' does not include contributions or expenditures reported pursuant to chapter 106 or federal election law, campaign-related personal services provided without compensation by individuals volunteering their time, or any other contribution or expenditure made by an organization that is exempt from taxation under 26 U.S.C. s. 527 or s. 501(c)(4).

The definition of "lobbies" in Section 112.3215(1)(f), Florida Statutes, includes "an attempt to obtain the goodwill of any agency official or employee." An "agency official or employee" means an officer or employee of an Executive Branch agency who is required to file financial disclosure. Section 112.3215(1)(b), Florida Statutes.

The issue we must address is whether corporate donations to the United Way of Florida and its local fiscal agents are indirect expenditures which principals are prohibited from making and agency officials and employees are prohibited from accepting. They are not direct expenditures because they are not given directly to an agency officer or employee by a principal or lobbyist of the Executive Branch. Instead, they are given to the local fiscal agents for the United Way, and they make the final disposition of the gifts or sponsorships in accordance with their objectives for the FSEC Campaign.

We have promulgated Rule 34-12.190, Florida Administrative Code, to provide guidance on indirect expenditures. It states:

34-12.190 Indirect Expenditures.

- (1) Where an expenditure is made to a person other than the agency official or employee by a lobbyist or principal, where the expenditure or the benefit of the expenditure ultimately is received by the agency official or employee, and where the expenditure is provided with the intent to benefit the agency official or employee, such expenditure will be considered a prohibited indirect expenditure to the agency official or employee.
- (2) Where an expenditure or the benefit of an expenditure is made to an agency official or employee by someone other than a lobbyist or principal, but the expenditure has been provided by or paid for by a lobbyist or principal who intends thereby to benefit the agency official or employee, such expenditure will be considered a prohibited indirect expenditure to the agency official or employee.
- (3) Factors which the Commission will consider in determining whether a prohibited indirect expenditure has been made include but are not limited to:
 - (a) The existence or nonexistence of communications by the lobbyist or principal, or by the intervening third person, indicating the lobbyist's or principal's intent to make or convey the expenditure to the agency official or employee rather than to the intervening third person;
 - (b) The existence or nonexistence of any relationship between the lobbyist or principal and the third person, independent of the relationship between the lobbyist or principal and the agency official or employee, that would motivate an expenditure to the third person;
 - (c) The existence or nonexistence of any relationship between the third person and the agency official or employee that would motivate the expenditure;
 - (d) Whether the same or similar expenditures have been or are being provided to other persons having the same relationship to the lobbyist or principal as the third person;
 - (e) Whether, under the circumstances, the third person had full and independent decision-making authority to determine whether the agency official or employee, or another, would receive the benefit of the expenditure;

(f) Whether the third person was acting with the knowledge or consent of, or under the direction of, the lobbyist or principal;

(g) Whether there were or were intended any payments or bookkeeping transactions between the third person and the lobbyist or principal reimbursing the third person for the expenditure; and

(h) The degree of ownership or control the lobbyist or principal has over the third person.

(4) The provisions of this rule may be illustrated by the following examples:

EXAMPLE 1: A law firm which lobbies the agency of Agency Employee A ("A") invites all of its attorneys to attend a weekend retreat. The attorneys are encouraged to bring their spouses or significant others at the firm's expense. A is married to an attorney in the firm and has been asked by her spouse to attend the retreat. The lodging, meals, and entertainment provided to A for the weekend retreat would not be considered a prohibited indirect expenditure to A because the firm's invitation was to A's spouse through his employment with the firm.

EXAMPLE 2: Agency Official B ("B") hosts a turkey shoot attended by other agency officials and employees. Lobbyists who lobby the agency of B give money to a third person, who is not an agency official or employee, to pay for the food and beverages which will be served at the turkey shoot. B orders and prepares the food and beverages. The money provided to the third person by the lobbyists would be a prohibited indirect expenditure to B, because it was given with the intent of benefiting B and his guests at the turkey shoot.

EXAMPLE 3: Agency Official C ("C") and C's spouse have arranged to take a trip to New York City. A lobbyist who lobbies C's agency meets with the spouse and offers her theater tickets. The lobbyist and C's spouse know each other only through the lobbyist's involvement with C. The theater tickets would be a prohibited indirect expenditure to C.

When we examine the factors listed in Rule 34-12.190(3), there is nothing to suggest that corporate donors are giving donations to the United Way in an effort to convey a personal benefit to an agency official or employee. We observe that corporate donors have no way of knowing in advance which employee, from which agency, is eligible to receive a prize or attend a sponsored meal. Their eligibility has nothing to do with their status as an "agency official or employee," as both reporting and non-reporting employees participate in the Campaign. Moreover, eligibility to receive a prize or attend a function may depend on other factors, such as the employee's contribution level, chance, or some other factor unknowable by a corporate donor. For these reasons, we are of the opinion that Section 112.3215(6)(a), Florida Statutes, is not violated by the donations and prizes that the United Way receives from corporate donors which it then uses to generate interest and participation in the Florida State Employees' Charitable Campaign among State agency employees. Concomitantly, agency officers and employees have not received a prohibited indirect expenditure when they receive a prize or participate in a United Way function made possible by a corporate sponsor.

Accordingly, corporate donations to the United Way of Florida and its local fiscal agents, used to generate interest and participation in the Florida State Employees' Charitable Campaign among State agencies, are not indirect expenditures prohibited by Section 112.3215(6)(a), Florida Statutes.

ORDERED by the State of Florida Commission on Ethics meeting in public session on July 28, 2006 and **RENDERED** this 2nd day of August, 2006.

Norm M. Ostrau, Chairman



FSEC Campaign Law

Section 110.181, Florida Statutes

110.181 Florida State Employees' Charitable Campaign.--

(1) CREATION AND ORGANIZATION OF CAMPAIGN.--

(a) The Department of Management Services shall establish and maintain, in coordination with the payroll system of the Department of Financial Services, an annual Florida State Employees' Charitable Campaign. Except as provided in subsection (5), this annual fundraising drive is the only authorized charitable fundraising drive directed toward state employees within work areas during work hours, and for which the state will provide payroll deduction.

(b) State officers' and employees' contributions toward the Florida State Employees' Charitable Campaign must be entirely voluntary.

(c) Participation in the annual Florida State Employees' Charitable Campaign must be limited to any nonprofit charitable organization which has as its principal mission:

1. Public health and welfare;
2. Education;
3. Environmental restoration and conservation;
4. Civil and human rights; or
5. Any nonprofit charitable organization engaged in the relief of human suffering and poverty.

(d) An independent unaffiliated agency must be a statewide entity whose programs provide substantial, direct, hands-on services that meet basic human or environmental needs and extend throughout the year and throughout the state.

(e) An international service agency must have well-defined programs that meet basic human or environmental needs outside the United States with no duplication of existing programs.

(f) A national agency must demonstrate, through a well-defined program, direct services meeting basic human or environmental needs which are readily available,

being administered, or providing a substantial direct benefit to the residents of this state.

(g) Any nonprofit charitable organization participating in the Florida State Employees' Charitable Campaign must have its financial records audited annually by an independent public accountant whose examination conforms to generally accepted accounting principles.

(h) Organizations ineligible to participate in the Florida State Employees' Charitable Campaign include, but are not limited to, the following:

1. Organizations whose fundraising and administrative expenses exceed 25 percent, unless extraordinary circumstances can be demonstrated.
2. Organizations whose activities contain an element that is more than incidentally political in nature or whose activities are primarily political, religious, professional, or fraternal in nature.
3. Organizations which discriminate against any individual or group on account of race, color, religion, sex, national origin, age, handicap, or political affiliation.
4. Organizations not properly registered as a charitable organization as required by the Solicitation of Contributions Act, ss. [496.401](#)-496.424.
5. Organizations which have not received tax-exempt status under s. 501(c)(3), Internal Revenue Code.

(2) SELECTION OF FISCAL AGENTS; COST.--

(a) The Department of Management Services shall select through the competitive procurement process a fiscal agent or agents to receive, account for, and distribute charitable contributions among participating charitable organizations.

(b) The fiscal agent shall withhold the reasonable costs for conducting the campaign and for accounting and distribution to the participating organizations and shall reimburse the department the actual cost, not to exceed 1 percent of gross pledges, for coordinating the campaign in accordance with the rules of the department. In any fiscal year in which the Legislature specifically appropriates to the department its total costs for coordinating the campaign from the General

Revenue Fund, the fiscal agent is not required to reimburse such costs to the department under this subsection. Otherwise, reimbursement will be the difference between actual costs and the amount appropriated.

(c) The fiscal agent shall furnish the department and participating charitable organizations a report of the accounting and distribution activities. Records relating to these activities shall be open for inspection upon reasonable notice and request.

(d) A local steering committee shall be established in each fiscal agent area to assist in conducting the campaign and to direct the distribution of undesignated funds remaining after partial distribution pursuant to paragraph (e). The committee shall be composed of state employees selected by the fiscal agent from among recommendations provided by interested participating organizations, if any, and approved by the Statewide Steering Committee.

(e) Participating charitable organizations that provide direct services in a local fiscal agent's area shall receive the same percentage of undesignated funds as the percentage of designated funds they receive. The undesignated funds remaining following allocation to these charitable organizations shall be distributed by the local steering committee.

(3) RULEMAKING AUTHORITY; ADMINISTRATIVE REVIEW.--

(a) In accordance with the recommendations of the steering committee, the department shall adopt rules relating to the time and manner for charitable organizations' participation in the campaign, selection and responsibilities of the fiscal agent, determination of eligible expenses, and such other rules as may be necessary to administer the campaign.

(b) Department action which adversely affects the substantial interests of a party may be subject to a hearing. The proceeding shall be conducted in accordance with chapter 120, except that the time limits set forth in s. [496.405\(7\)](#) shall prevail to the extent of any conflict.

(4) FLORIDA STATE EMPLOYEES' CHARITABLE CAMPAIGN STEERING COMMITTEE.--

A Florida State Employees' Charitable Campaign steering committee shall be established with seven members appointed by members of the administration commission, and two members appointed by the secretary of the

department from among applications submitted from other agencies or departments. The committee, whose members shall serve staggered terms, shall meet at the call of the secretary. Members shall serve without compensation, but shall be entitled to receive reimbursement for travel and per diem expenses as provided in s. [112.061](#).

(5) PARTICIPATION OF STATE UNIVERSITIES.--Each university may elect to participate in the Florida State Employees' Charitable Campaign, upon timely notice to the department. Each university may also conduct annual charitable fundraising drives for employees under the authority granted in s. [1001.74](#)(19).

History.--s. 1, ch. 93-56; s. 7, ch. 99-399; s. 891, ch. 2002-387; s. 120, ch. 2003-261; s. 1, ch. 2006-221.



FSEC CAMPAIGN RULE

Chapter 60L-39

(effective May 16, 2010)

Florida Administrative Code

**RULES OF THE
DEPARTMENT OF MANAGEMENT SERVICES**

**CHAPTER 60L-39
FLORIDA STATE EMPLOYEES' CHARITABLE CAMPAIGN**

60L-39.001 Scope and Purpose.

In order to provide a means by which employees may voluntarily engage in charitable giving, the State of Florida has an interest in establishing a consolidated charitable campaign with minimal workplace disruption and administrative costs. To that end, this chapter sets forth the rules governing the Florida State Employees' Charitable Campaign (FSECC or "the Campaign") in accordance with Section 110.181, F.S.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-1-02, Amended 1-23-07, 5-16-10.

60L-39.0015 Definitions.

(1) The following definitions apply to this rule chapter:

(a) Activities. The specific pursuit of actions by the charitable organization in terms of the services provided through its charitable work. This phrase does not refer to internal structure or membership of the charitable organization.

(b) Campaign. The Florida State Employees' Charitable Campaign, as set forth in Section 110.181, F.S., and Rule Chapter 60L-39, F.A.C.

(c) Campaign Brochure. The compiled listings and descriptions of all approved charitable organizations to which employees may contribute and which may vary in content by fiscal agent area.

(d) Campaign Cycle. A time period that begins with the March 1 Form DMS-ADM-100 (rev. 03/10) application deadline for participation in a given fundraising drive and concludes at the end of the following calendar year once all payroll deductions have been collected and distributed for that drive.

(e) Charitable Organization. A non-profit entity as defined in Section 496.404(1), F.S., that is properly registered as a charitable organization pursuant to Section 496.405, F.S., or an entity that is the umbrella group for such entities.

(f) Completed Application. A Form DMS-ADM-100 (rev. 03/10) or Form DMS-ADM-102 (rev. 03/10) on which charitable organizations have provided the requested information for every applicable question and data field, including the required supporting documentation.

(g) Designated Funds. Those contributions which the employee designates to specific charitable organizations participating in the FSECC.

(h) Direct Services. Specific activities performed by a charitable organization in a local fiscal agent area that provides an identifiable benefit to one or more residents within the fiscal agent area or to an entity that provides identifiable benefits to the residents of that fiscal agent area.

(i) Fiscal Agent. An entity selected by the Department of Management Services through the competitive procurement process and placed under contract to administer the receipt of, accounting for and distribution of the charitable contributions to the participating charitable organizations and to perform other appropriate administrative services as negotiated through contract.

(j) Fiscal Agent Area. A geographic region of the state as designated in Form DMS-ADM-102 (rev. 03/10) for administrative convenience and used to administer the contracted services through local fiscal agents.

(k) Fraternal. Relating or belonging to a fraternity or an association of persons formed for mutual aid and benefit, but not for profit.

(l) Incidentally. Of a minor or subordinate nature to a charitable organization's charitable activities.

(m) Independent Unaffiliated Agency. A charitable organization which is not an umbrella group or a member of any umbrella group.

(n) International Service Agency. A charitable organization with any programs outside the United States.

(o) Local Fiscal Agent. An entity or entities with whom the Fiscal Agent may contract to manage the campaign and receive, account for and distribute charitable contributions among participating charitable organizations in a specific fiscal agent area.

(p) National Agency. An umbrella group or an affiliated member of an umbrella group serving basic human or environmental needs inside the United States. This definition excludes any charitable organization that is a member or affiliate of the United Way of Florida, Inc.

(q) Political. Relating to a national or state political party or any organization, explicitly calling for or attempting to influence the election or defeat of a particular candidate or issue within a specific election or relating to an organization engaged in lobbying as defined in Section 11.045(1)(f), F.S.

(r) Primarily. Chiefly, principally or mainly as it relates to the activities of the charitable organization and not its internal structure or membership.

(s) Professional. Relating to an occupation requiring considerable training and specialized study which is subject to an association, the purpose of which is to promote a common business interest and to improve business conditions in one or more lines of business, e.g., law, medicine or engineering, not to engage in a regular business of a kind ordinarily carried on for profit.

(t) Religious. Relating to religion as practiced by any church, ecclesiastical or denominational organization with an established physical place where religious worship is regularly conducted.

(u) Statewide Steering Committee. The Steering Committee established in Section 110.181(4), F.S.

(v) Tier One Undesignated Funds. Those contributions for which employees did not designate a specific charitable organization and which are distributed by the Statewide Steering Committee on a pro rata basis pursuant to Section 110.181(2)(e), F.S.

(w) Tier Two Undesignated Funds. Those monies remaining after Tier One distribution of undesignated funds and which are distributed by the local steering committees, pursuant to Section 110.181(2)(e), F.S.

(x) Umbrella Group. An entity that is a federated fundraising organization as defined in Section 496.404(10), F.S.

(2) All other terms shall have their commonly understood meaning.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-23-07, Amended 5-16-10

60L-39.003 Statewide Steering Committee.

(1) The members of the Statewide Steering Committee shall serve staggered four-year terms.

(2) To facilitate effective and efficient departmental oversight and maintenance of the campaign, the Secretary shall designate one of the Department's appointees to serve as the chairperson of the committee. The Chairperson may call meetings of the Statewide Steering Committee on behalf of the Secretary, coordinate meeting agendas and preside over the meetings.

(3) The Statewide Steering Committee shall assist the Department in an advisory role regarding the development of procedures and guidelines that support administration of the campaign.

(4) The Statewide Steering Committee shall approve the statewide calendar of events and marketing materials proposed by either the Department or the fiscal agent.

(5) The Statewide Steering Committee shall review all Form DMS-ADM-100 (rev. 03/10) applications before June 1 of each campaign cycle and recommend approval or denial on the basis of compliance with the established criteria, completeness and timely submission.

(6) The Statewide Steering Committee shall review all Form DMS-ADM-102 (rev. 03/10) applications for receipt of Tier One undesignated funds before January 31 of each campaign cycle and recommend approval or denial on the basis of compliance with the established criteria, completeness, and timely submission.

(7) If needed for purposes of recommending an action to the Department, the Statewide Steering Committee may request clarification of any information provided by a charitable organization which has filed a completed application. If requested, umbrella groups shall provide contact information for member organizations with whom the Statewide Steering Committee may wish to correspond

directly. In order to be considered, the requested clarification shall be submitted to the Department within five business days of the receipt of the Committee's request. Submitted means electronically submitted or postmarked no later than 11:59 p.m. on the fifth business day.

(8) The Statewide Steering Committee shall recommend to the Department approval or denial of any reviewed Form DMS-ADM-100 (rev. 03/10) application and Form DMS-ADM-102 (rev. 03/10) application.

(9) The Statewide Steering Committee shall ensure that campaign brochures and materials, whether produced by the Department or the fiscal agent, treat all participating charitable organizations equally and fairly and conform to the following:

(a) Campaign brochures shall provide the same type, size, and color print for all participating charitable organizations.

(b) The campaign brochure in each fiscal agent area shall group charitable organizations by their respective umbrella group into separate sections of the brochure. The order of the umbrella groups shall be alphabetical. The individual charities that comprise an umbrella group shall be listed in alphabetical order within the umbrella group listing, except that the umbrella group itself will be listed first, if applicable. Independent unaffiliated agencies shall be grouped together alphabetically as one listing and appear as the last section of the brochures.

(c) A campaign brochure that is specific to a geographic area shall not list both the state or national charitable organization and its local affiliate or other subunit.

(d) In cases where a charitable organization has submitted more than one application, such charitable organization shall be listed under the United Way, if applicable. Otherwise, their listing in the brochure shall be determined on the basis of the approved application which was received by the Department first. In no case shall a charitable organization be given a dual listing in the same campaign brochure.

(e) Campaign brochures shall include the words Florida State Employees' Charitable Campaign and the official FSECC logo on the front cover.

(f) Campaign brochures shall exclude any local fiscal agent logo and slogan that is not unique to the campaign. The local fiscal agents shall be identified in their respective campaign brochures only by their designated fiscal agent code, the counties they serve or both.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-6-02, Amended 3-5-04, 1-9-05, 2-13-06, 1-23-07, 5-16-10.

60L-39.004 Eligibility Criteria for Participation by Charitable Organizations.

(1) For purposes of ensuring compliance with the eligibility criteria of Sections 110.181(1)(c)-(h), F.S., charitable organizations are subject to the following:

(a) Charitable organizations with fundraising and administrative expenses in excess of 25% shall provide justification to demonstrate extraordinary circumstances beyond the charitable organization's control.

(b) Religious charitable organizations which provide services described in Section 110.181, F.S., shall not be excluded because of religious viewpoint.

(c) Organizations which comply with all applicable state and federal nondiscrimination laws shall be deemed in compliance with Section 110.181(1)(h)3., F.S.

(d) Organizations which are required to register pursuant to the Solicitation of Contributions Act, Chapter 496, F.S., shall have a registration number that is valid on March 1, of the application year.

(e) Organizations which are duly registered under section 501(c)(3), Internal Revenue Code, shall be deemed in compliance with Section 110.181(1)(h)5., F.S.

(2) Once approved for participation, any charitable organization may be disqualified by majority vote of the Steering Committee for:

(a) Failing to maintain eligibility for participation in the campaign, if such failure occurs prior to publication of the campaign brochure; or,

(b) Filing an application to participate in the FSECC that contains false or misleading information that is material to the applicant's eligibility.

(3) Pursuant to federal law, participating charitable organizations shall not be on the list of persons and entities designated under Executive Order 13224, the United States Treasury

Department's "master list" of specially designated nationals and blocked persons, and the United States State Department's list of foreign terrorist organizations. In addition, participating charitable organizations shall certify that they are in compliance with all statutes (including prohibitions against terrorism as defined in 18 U.S.C. §2331), Executive orders, and regulations restricting or prohibiting U.S. persons from engaging in transactions and dealings with countries, entities, or individuals subject to economic sanctions administered by the U.S. Department of the Treasury's Office of Foreign Assets Control.

(4) An Independent Unaffiliated Agency shall be deemed to be providing services throughout the year and throughout the state in accordance with Section 110.181(1)(d), F.S., if they demonstrate that their services were provided every month of the calendar year and in every fiscal agent area.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-6-02, Amended 1-23-07, 5-16-10.

60L-39.0041 Eligibility Criteria for Receipt of Tier One Undesignated Funds.

(1) In order to be eligible for Tier One undesignated funds, the charitable organization must be approved for participation in the current campaign cycle and, in accordance with Section 110.181(2)(e), F.S., must have provided direct services in the preceding calendar year.

(2) For the purposes of administering Section 110.181(2)(e), F.S., direct services include:

- (a) Providing family, foster care or adult/child care;
- (b) Providing transportation, information, referral, or counseling services for the disadvantaged population;
- (c) Providing adoption services;
- (d) Preparing or delivering meals; feeding the hungry;
- (e) Providing emergency shelter care or relief services;
- (f) Providing safety or protective services for adults or children;
- (g) Providing neighborhood or community health and welfare, care, grants, or recreation services;
- (h) Providing rehabilitation services;
- (i) Providing health education, or patient services/support;
- (j) Providing social adjustment, counseling, rehabilitation, or job training;
- (k) Providing a combination of services designed to meet the needs of special groups such as the elderly or persons with disabilities;
- (l) Providing scholarships, grants or a combination of financial/material assistance to provide education or job training for the disadvantaged population;
- (m) Providing individual or family legal counseling for the indigent;
- (n) Conserving, protecting, or restoring the State's environment;
- (o) Any other well-defined substantial, direct, hands-on specific act performed in the specific fiscal agent area in which the charitable organization is applying.

(3) For the purpose of administering Section 110.181(2)(e), F.S., if the only service that a charitable organization provided are one or more of the following activities, such services shall not constitute direct services:

- (a) Maintaining, defending or settling any legal proceeding, except as provided in paragraph (2)(m);
 - (b) Holding meetings of the board of directors or members, or carrying on other activities concerning internal corporate affairs;
 - (c) Maintaining bank accounts;
 - (d) Fundraising, whether in person, via telephone, etc.;
 - (e) Distributing unsolicited informational materials;
 - (f) Operating internet websites, toll-free numbers, etc.;
 - (g) Distributing advocacy materials;
 - (h) Lobbying for passage or defeat of legislation;
 - (i) Engaging in activities intended to shape public policy;
 - (j) Marketing activities, such as billboards and public service announcements.
- (4) Once determined to be providing direct services in a fiscal agent area, any charitable

organization may be disqualified by majority vote of the Steering Committee for:

- (a) Failing to comply with the procedures contained in this chapter; or
- (b) Filing an application to participate in the FSECC that contains false or misleading information.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History–New 5-16-10.

60L-39.005 Application Procedures.

(1) Application for annual participation in the FSECC shall be submitted no later than March 1 of each year on Form DMS-ADM-100 (rev. 03/10), Application for Participation in the Florida State Employees' Charitable Campaign, effective 5-16-10, which is hereby incorporated by reference. This form shall be available on the Department's website:

http://dms.myflorida.com/human_resource_support/human_resource_management/for_state_personnel_system_employees/state_employees_charitable_campaign and upon request.

(a) Electronic applications shall be submitted to the electronic address specified by the Department on the application form by 11:59 p.m. (Eastern Time), on March 1.

(b) In the event the application form and supporting documentation are submitted as a paper package, the submission must be postmarked by March 1.

(c) An umbrella group may submit applications on behalf of its members.

(d) Each charitable organization shall document administrative expenses, fundraising expenses and total revenue, as follows:

1. Each charitable organization required to file IRS Form 990 shall submit a copy of the applicable pages of its most recently filed IRS Form 990, in accordance with the instructions for completing Form DMS-ADM-100 (rev. 03/10), provided that such 990 is for a fiscal period ending not more than 24 months prior to March 1.

2. Charitable organizations which are not required to file an IRS Form 990 or which file an IRS Form 990 EZ or an IRS Form 990 PF shall submit a copy of the applicable pages of an IRS Form 990 and shall submit these pages with their application, in accordance with instructions on the Form DMS-ADM-100 (rev. 03/10).

(2) Application for Receipt of Tier One Undesignated Funds, pursuant to Section 110.181(2)(e), F.S., shall be made on Form DMS-ADM-102 (rev. 03/10), Direct Local Services Certification Form, effective 5-16-10, which is hereby incorporated by reference. This form shall be available on the Department's official website:

http://dms.myflorida.com/human_resource_support/human_resource_management/for_state_personnel_system_employees/state_employees_charitable_campaign and upon request.

(a) In order to be considered for the receipt of Tier One undesignated funds, umbrella groups, on behalf of their member agencies, and all independent unaffiliated agencies shall annually submit completed Form DMS-ADM-102 (rev. 03/10) applications to the electronic address specified by the Department on the application form by 11: 59 p.m. (Eastern Time), on October 1 of the campaign year for which they have been approved to participate.

(b) In the event the application and any applicable supporting documentation is submitted as a paper package, the submission must be postmarked by October 1.

(3) The Statewide Steering Committee shall only consider complete applications for inclusion in the Campaign or for the receipt of Tier One undesignated funds. Incomplete applications shall be deemed denied without further action from the Statewide Steering Committee.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History–New 1-1-02, Amended 3-5-04, 1-9-05, 2-13-06, 1-23-07, 5-16-10.

60L-39.006 Department Duties and Responsibilities.

(1) The Department shall be responsible for effectively and efficiently administering the Campaign by procuring, through the competitive bid process, a fiscal agent who, in accordance with a service contract, shall:

(a) Provide state level coordination of the campaign and oversee the activities of local fiscal agents, which receive, account for, and distribute charitable contributions among participating charitable organizations;

(b) Select, train and partner with local steering committees composed of state employees in the

fiscal agent area to assist in conducting the campaign and to direct the distribution of Tier Two undesignated funds.

- (c) Train agency coordinators and volunteers in the methods of non-coercive solicitation;
 - (d) Honor employee designations;
 - (e) Help to ensure that no employee is coerced or questioned as to the employee's designation or its amount, other than for arithmetical inconsistencies;
 - (f) Respond in a timely and appropriate manner to inquiries from employees, participating charitable organizations, umbrella groups or the Statewide or Local Steering Committees;
 - (g) Distribute Tier One undesignated funds awarded by the Statewide Steering Committee to participating charitable organizations in the same percentage as the designated funds received by those participating charitable organizations.
 - (h) Distribute Tier Two undesignated funds awarded by the local steering committees to appropriate charitable organizations in the campaign;
 - (i) Distribute campaign funds to participating charitable organizations on at least a quarterly basis. If a local fiscal agent's prior year's collections from the FSECC fall below the prior year's median raised by all local fiscal agents (an amount to be determined by the state fiscal agent by calculating the median amount raised by all local fiscal agents), the local fiscal agent is authorized to make distributions on a less than quarterly basis, so long as all distributions are made within the funding year;
 - (j) Withhold the reasonable costs for conducting the campaign and for accounting and distribution to the participating charitable organizations. These costs shall be shared proportionately by the participating charitable organizations based on their percentage share of the gross campaign;
 - (k) In cases where the local fiscal agents host events on behalf of the campaign, ensure that an invitation to attend is extended to all charitable organizations approved for participation in the campaign. Local fiscal agents may invite charitable organizations that are members of an umbrella group by extending the invitation to their respective umbrella group;
 - (l) Perform other services or duties assigned by the Department.
- (2) The Department shall ensure that all application reviews have taken into consideration all applicable criteria as stipulated in Section 110.181, F.S., this rule or other federal regulations.
- (3) Upon conclusion of the Statewide Steering Committee's review of all applications, the Department shall document their final recommendations, pursuant to subsection 60L-39.003(8), F.A.C., and forward them to the Secretary, who will make the final determinations. The Department shall then notify all applicant charitable organizations and their umbrella group, if applicable, of their approval or denial and their appeal rights. Denied charitable organizations shall be notified by certified letter and advised of their appeal rights.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-6-02, Amended 3-5-04, 1-9-05, 2-13-06, 1-23-07, 5-16-10.

60L-39.007 Appeals.

- (1) Charitable organizations that have been notified of their ineligibility to participate in the campaign or to receive pro rata Tier One undesignated funds may appeal within seven working days after the receipt of the notice of ineligibility.
- (2) Charitable organizations or their respective umbrella group may not introduce new material designed to complete an application during the appeal process. This provision is established specifically to preclude the use of the appeal process to expand the time available to assemble a complete application by the required deadlines.
- (3) All appeals for participation in the campaign shall be concluded by June 30 to allow timely publication of authorized participating charitable organizations in the FSECC brochures.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 1-6-02, Amended 3-5-04, 5-16-10.

60L-39.008 Local Steering Committees.

(1) By May 1 of each year, the fiscal agent shall forward to the Statewide Steering Committee for approval a list of the names, employing agencies and recommending entities of all state employees nominated for local steering committee membership. If, in the assessment of the fiscal agent, the total number of recommendations in a particular fiscal agent area would make the size of the local steering committee unmanageable, the fiscal agent shall advise the Statewide Steering Committee which of the total number of recommended state employees it wishes to select for local steering committee membership;

(a) If, after the above referenced list has been approved, a local steering committee wishes to add or substitute state employees to carry out its responsibilities, the fiscal agent shall forward to the Statewide Steering Committee such changes for their review and approval.

(b) Resignations of state employees from the local steering committees do not require the approval of the Statewide Steering Committee.

(2) Local steering committees shall, with the assistance of the local fiscal agent, notify participating charitable organizations of the name and contact information of the local steering committee chairperson and members. The local steering committee shall ensure public access to all local steering committee meetings. For meetings during which Tier Two undesignated funds will be discussed, the local steering committee shall, with the assistance of the local fiscal agent, ensure a minimum of a two-week notice is provided to participating charitable organizations or their respective umbrella group, if applicable. Such notice shall include a posting on the Department's official website.

(3) When practicable, charitable organizations seeking a distribution of Tier Two undesignated funds may submit written materials in support of their request to the local steering committee in advance of any meeting at which distribution of Tier Two undesignated funds will be determined. All charitable organizations approved for participation in the current year's campaign are eligible for consideration for the receipt of Tier Two undesignated funds.

(4) Upon determination of the charitable organizations that will receive Tier Two undesignated funds and the respective amounts to be distributed, each local steering committee shall document the charitable organizations selected, the amount awarded to them and the rationale for those decisions.

(5) Any local steering committee member shall disclose any affiliation with a participating charitable organization at the onset of any meeting during which distribution of Tier Two undesignated funds will be discussed.

(6) The decisions of local steering committees regarding distribution of Tier Two undesignated funds may be reviewed by the Statewide Steering Committee for abuse of discretion. Any charitable organization that wishes to request a review by the Statewide Steering Committee shall submit a request in writing to the Department, which outlines the factual basis for review, within seven business days of the local steering committee's determination. The Statewide Steering Committee shall convene to consider any request for review and shall recommend appropriate action to the Department.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History—New 5-16-10.

60L-39.009 Campaign Supported Activities.

(1) The FSECC shall be the only workplace charitable fundraising program in state government that receives official state coordination and support at any given time.

(2) Agencies are authorized to sponsor voluntary events during work hours to raise awareness of the campaign, generate funds, and promote payroll pledges. The agency head shall approve such activities and shall ensure that:

(a) No employee is coerced to participate or otherwise singled out for not participating in events or declining to contribute or pledge funds;

(b) Workplace events benefit the FSECC as a whole and do not target any particular participating charity(ies); and

(c) The duration of the employees' absence from their work station, whether or not travel outside of the workplace facilities is necessary, and any significant potential for injury are considered before

determining whether participation in a workplace event shall constitute work time, or shall require the use of accrued leave or leave without pay, in accordance with Chapter 60L-34, F.A.C.

(3) Workplace events at Department managed facilities shall be pre-authorized by and coordinated with the Division of Real Estate Development and Management, pursuant to Chapter 60H-6, F.A.C.

(4) Time spent by employees who the agency has assigned to coordinate, communicate, or provide training related to the campaign, or who attend training or events held to recognize their role or contribution to the campaign, shall be considered work time.

(5) Participating charities may attend any workplace campaign event; however, charitable organizations shall not permit, plan, or conduct distribution or display of any materials, solicitation, or services of any specific charity within State facilities as part of the campaign.

(6) Charitable organizations are permitted to publicize their activities and solicit employee participation in the FSECC through the news media or other private outlets outside State facilities. Charitable organizations seeking to raise funds shall not contact employees at the work place for any purpose related to fundraising. However, the fiscal agent may contact employees or distribute approved campaign materials solely for the purpose of performing fiscal agent duties.

Rulemaking Authority 110.181(3) FS. Law Implemented 110.181 FS. History–New 5-16-10.

NOTES re: 60L-39.009(3) from the FSECC Rule – Application for Use of State Property

(3) Workplace events at Department managed facilities shall be pre-authorized by and coordinated with the Division of Real Estate Development and Management, pursuant to Chapter 60H-6, F.A.C.

- Have all requests for space use come to DMS via the Agency’s Statewide Coordinator (SAC), so that there is one central point of contact for DMS and we know the SAC is aware of the proposed activity and can ensure that it is endorsed by agency upper management, coordinates appropriately with other agency campaign activities, etc.
- Multiple events can be processed at one time, using just one application form, but listing all the activities, their corresponding dates/times, and sites (if more than one) separately as an attachment.
- Consider nature of activity and have employees sign a waiver whenever appropriate. If an event is planned that has the possibility that someone could get hurt (i.e., water dunking booth, balloon toss, tug-o-war, etc.), a waiver should be completed by each participant prior to engaging in the activity. The person overseeing the activity should hold on to the completed waiver forms for a period of a year and turn them over to DMS should there be a problem.

DMS Application for Use of State Property – page 43

Assumption of Risk and Release of Liability Form – page 44

**STATE OF FLORIDA
DEPARTMENT OF MANAGEMENT SERVICES
REAL ESTATE DEVELOPMENT AND MANAGEMENT
APPLICATION FOR USE OF STATE PROPERTY**

ORGANIZATION NAME: _____

- NON-PROFIT CORP NON-PROFIT ASSN OTHER NON-PROFIT ENTITY
 FOR-PROFIT CORP FOR-PROFIT ASSN OTHER FOR-PROFIT ENTITY

DESCRIBE OTHER: _____

CONTACT: _____ POSITION: _____

ON-SITE COORDINATOR (IF DIFFERENT FROM CONTACT): _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

BUSINESS PHONE: _____ FAX: _____

CELL OR PAGER: _____ EMAIL: _____

SPACE REQUESTED:	FUNCTION		SET UP	
	DAY/DATE	TIME	DAY/DATE	TIME
<input type="checkbox"/> HISTORIC FRONT STEPS		am pm		am pm
<input type="checkbox"/> COURTYARD/BACK STEPS <input type="checkbox"/> C1 <input type="checkbox"/> C2 <input type="checkbox"/> C3		am pm		am pm
<input type="checkbox"/> ROTUNDA		am pm		am pm
<input type="checkbox"/> WALLER PARK		am pm		am pm
<input type="checkbox"/> VIETNAM MEMORIAL		am pm		am pm
<input type="checkbox"/> OTHER (BLDG/AREA):		am pm		am pm

DESCRIBE INTENDED ACTIVITY: _____

IS ACTIVITY RELATED TO GOVERNMENTAL OR GOVERNMENTAL-SPONSORED FUNCTION? PLEASE EXPLAIN:

IF NOT, EXPLAIN THE PUBLIC SERVICE PERFORMED OR RELATION TO PUBLIC CONCERN: _____

SERVICES LIMITED TO MEMBERS? NO YES AVAILABLE TO GENERAL PUBLIC? YES NO

NUMBER OF ORGANIZATION PARTICIPANTS: _____ TOTAL NUMBER OF ATTENDEES: _____

DOES APPLICANT DESIRE TO BRING ANY PHYSICAL OBJECTS OR EQUIPMENT ON PROPERTY? YES NO

DESCRIBE SHAPES/SIZES: _____

VEHICLES USED TO UNLOAD/RELOAD: _____

ADDITIONAL COMMENTS: _____

PLEASE COMPLETE AND RETURN TO: SHERRIE ROUTT, PHONE 850/413-9586, FAX 850/617-6476, ADDRESS: 4050 ESPLANADE WAY, SUITE 315, TALLAHASSEE, FL 32399-0950, EMAIL: Sherrie.Routt@dms.myflorida.com

PLEASE NOTE: OFFICIAL GOVERNMENT FUNCTIONS TAKE PRECEDENCE. THIS MAY VOID APPROVAL OR REQUIRE TEMPORARY RELOCATION OR DISRUPTION OF ACTIVITY. DUE TO RECENT THREATS TO NATIONAL SECURITY, CAPITOL POLICE/FDLE HAS ADVISED THAT ALL APPROVED FUNCTIONS ON STATE PROPERTY ARE SUBJECT TO CANCELLATION. APPLICATIONS ARE ACCEPTED ON A FIRST-COME, FIRST-SERVED BASIS.

ASSUMPTION OF RISK AND RELEASE OF LIABILITY

I, _____, have elected to participate in an activity outside of the scope of normal business (PROGRAM) sponsored by the Department of _____ (Department). In consideration for my access and use of facilities occupied by the Department and under the management of the Department of Management Services (DMS) for the State of Florida, I hereby execute this Release fully releasing and discharging the State, including the Department and DMS, and its employees, Volunteers, and agents (herein-after collectively referred to as "State") on behalf of myself and my children, parents, assigns, heirs, personal representatives, and estate as follows:

- 1. I fully understand and appreciate the dangers, hazards, and risks inherent to physical activity, and that exercise may be a risk to physical health and safety. I further understand that it is the Department's recommendation that I consult a physician prior to using any equipment on the premises, engaging in any exercise programs or activity, or undertaking any food or diet program, whether or not such program is recommended by the Department. I understand that neither the Department nor the advice of any employee of the Department is a substitute for medical advice, and the Department does not in any way endorse or control the content or conduct of exercise instruction or instructors that may take place within the facility. I acknowledge that I have had the prior opportunity to, and have, consulted a physician before using this facility.
2. I expressly agree that participation in the Program is an acceptance and assumption of all risks associated with using this facility, including but not limited to damage, injury or loss of personal property and damage, injury or loss to my person. I acknowledge and affirm that my use of the facility is purely and completely voluntary and not within the scope of any employment with the State or any entity conducting business with the State, if any such employment exists while this Release is in effect. I elect to participate with full and complete knowledge and willingness to assume any and all attendant risks. I further agree to exercise reasonable care and conduct during my use of the facility, and agree not to wear or use or do anything that poses or may pose a hazard to myself, others present, or the facility itself.
3. I hereby voluntarily release, forever discharge, indemnify and hold harmless the State from any and all claims, demands, or causes of action, which are in anyway associated with my use of the State's equipment or facility, excepting such claims which allege damage, injury or loss to property or person that is directly due to the negligence of the Department.
4. I recognize and agree that my access and use of the facility for the prescribed purpose shall not create, or be construed to create, any special relationship between myself and the State or otherwise extend, elevate, or enlarge the State's obligations to me beyond the minimum legal duty required or applicable under Florida law.
5. Should the State, or anyone acting on its behalf, be required to incur attorney fees and costs to enforce this Release, I further agree to indemnify the State for all such fees and costs.
6. I certify that I have adequate insurance to cover any injury or damage I may cause or suffer while using the facility, or else I agree to bear the costs of such injury or damage myself. I further certify that I have no medical or physical conditions which could interfere with or adversely affect my use of this facility, or else I am willing to assume and bear the costs of all risks that may be created, directly or indirectly, by any such condition.
7. I understand that if any provision of this Release is held to be invalid, such invalidity will not affect other provisions of the Release, which shall be given effect with or without the invalid provisions, and to this end the provisions of this Release are meant to be severable.
8. I represent that I am 18 years of age or older and legally capable of entering into and being fully bound by this Release.

By signing this document, I acknowledge that if anyone is hurt or property is lost or damaged during my use of the State's facility, I may be found by a court of law to have waived my right to maintain a lawsuit against the State on the basis of any claim from which I have released them herein.

I HAVE HAD SUFFICIENT OPPORTUNITY TO READ THIS ENTIRE DOCUMENT. I HAVE READ AND UNDERSTOOD IT, AND I AGREE TO BE BOUND BY ITS TERMS.

Name of participant _____ Date of Birth ___/___/___

Phone (___) ___ - ___

Signature: _____ Date ___/___/___

