



# County of San Bernardino COMBINED GIVING

The Combined Giving Campaign is a Countywide program that allows employees to make bi-weekly payroll deductions or a one-time deduction to a charitable organization of their choice.

## REFERENCES

Combined Giving Campaign Brochure (CGC Brochure)

## FORMS REQUIRED

Combined Giving One-Time Deduction Agreement  
Combined Giving Contribution Election Agreement

## MANDATORY FIELDS

Employee ID; Rcd No.; Last Name, First Name;  
Effective Pay Period; Department; Work  
Telephone; Action (Initiate, Revise or Cancel);  
Agency Code; Dollar Amount; Signature and Date

## GENERAL INFORMATION

Once each year, generally in the fall, the County conducts a Combined Giving Campaign (CGC). Prior to the start of the CGC, Employee Benefits and Services Division, Human Resources (EBSD) sends a letter to all department heads requesting that they designate a department CGC Coordinator. All coordinators are asked to attend a Coordinator Training during which they will receive CGC promotional materials, agency information and form processing training. Since payroll specialists are commonly assigned to coordinate their department's campaign, a list of Coordinator responsibilities is included in this procedure. If the payroll specialist is not the department's designated coordinator, the payroll specialist is only responsible for those duties listed under the Payroll Specialist Responsibilities section of this document.

Employees may elect either bi-weekly payroll deductions or a one-time deduction by completing the appropriate form. Employees may donate to one or more agencies listed in the CGC Brochure or they may make contributions to a charitable organization not listed in the CGC Brochure (Your Choice) by using codes ending in "98." The employee must list the agency information in the 'Your Choice' section of the form. When the 'Your Choice' code is used, an administrative fee for routing the funds to the appropriate organization will be deducted from the donation.

Department CGC Coordinators will be provided a report listing participating employees in their departments, the employees' selected agencies and the deduction amounts. This report is to be used to answer employees' questions and to audit new election forms. It is not to be used to solicit contributions and it should not be provided to the department payroll specialist unless he or she is acting in the capacity of department CGC Coordinator.

Unlike other County benefits, CGC payroll deductions may be started, revised, or stopped at any time, with the exception of the one-time payroll deduction which is processed in pay period one (1) only. Please note for election changes made outside of the annual CGC period, the form distribution guidelines will differ from distribution guidelines used during the CGC period.

## EMPLOYEE RESPONSIBILITIES

- ◆ To initiate a new ongoing deduction the employee checks the 'Initiate' option, enters Agency Name and Code, designates the bi-weekly deduction amount, and signs and dates the Contribution Election Agreement form.
- ◆ To increase or decrease the amount of an ongoing deduction without changing the agency, the employee checks the 'Revise' option, enters the Agency Name and Code, designates the new bi-weekly deduction amount, and signs and dates the Contribution Election Agreement form. The employee should not check 'Revise' if there is a change in agency.

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- ◆ To change from one agency to another, the employee must first cancel their current deduction by checking 'Cancel' on the Contribution Election Agreement form and entering Agency Name and Code. Employee then initiates a new deduction by checking 'Initiate' option, entering the new Agency Name and Code, designating the bi-weekly deduction amount, and signing and dating the Contribution Election Agreement form.
  - ◆ To initiate a one-time payroll deduction, the employee must complete the One-Time Deduction Agreement form. The employee enters the desired Agency Name and Code, designates the amount of the one-time deduction, and signs and dates the form. The deduction will be taken in pay period one (1) only. Forms may only be submitted during the Annual Campaign period. This election is not a recurring annual election, and as such employees need to resubmit their election for a One-Time Deduction Agreement each year.
  - ◆ For 'Your Choice' contributions, if a '98' code is used for bi-weekly payroll deductions or for a one-time donation, the employee must provide all organization information requested in the 'Your Choice' section of the form.
  - ◆ To request acknowledgment of donation(s), the employee must complete the 'Acknowledgment Requested' section of the form.

### **COORDINATOR RESPONSIBILITIES**

- ◆ Attend Coordinator Training
- ◆ Post and distribute promotional materials
- ◆ Request approval to conduct campaign events with department head
- ◆ Schedule federation presenters (if applicable)
- ◆ Plan and implement department campaign
- ◆ Collect all forms
- ◆ Audit forms for completeness
- ◆ Submit all forms directly to EBSD (0440) during the campaign period (payroll specialist signature not required) and to the department's payroll specialist when outside of the campaign period

### **PAYROLL SPECIALIST RESPONSIBILITIES**

- ◆ Respond to employee questions regarding current payroll deductions for charitable contributions
- ◆ Audit ongoing deduction and one-time deduction agreement forms against report for accuracy and completeness
- ◆ Verify Agency Codes

### **DISTRIBUTION GUIDELINES**

- ◆ During annual campaign send Contribution Election Agreement and One-Time Deduction Agreement to EBSD-HR (0440)
- ◆ Outside of annual campaign send Contribution Election Agreement to EMACS-Payroll (0030). One-Time Deduction Agreements may only be submitted during annual campaign period.

### **RELATED FORMS/PROCEDURES**

Checklist for New Hire-Contract  
Checklist for New Hire-Extra Help-Recurrent  
Checklist for New Hire-Exempt  
Checklist for New Hire-PSE  
Checklist for New Hire-Regular-Part-Time-Reemployment (Rehire)