

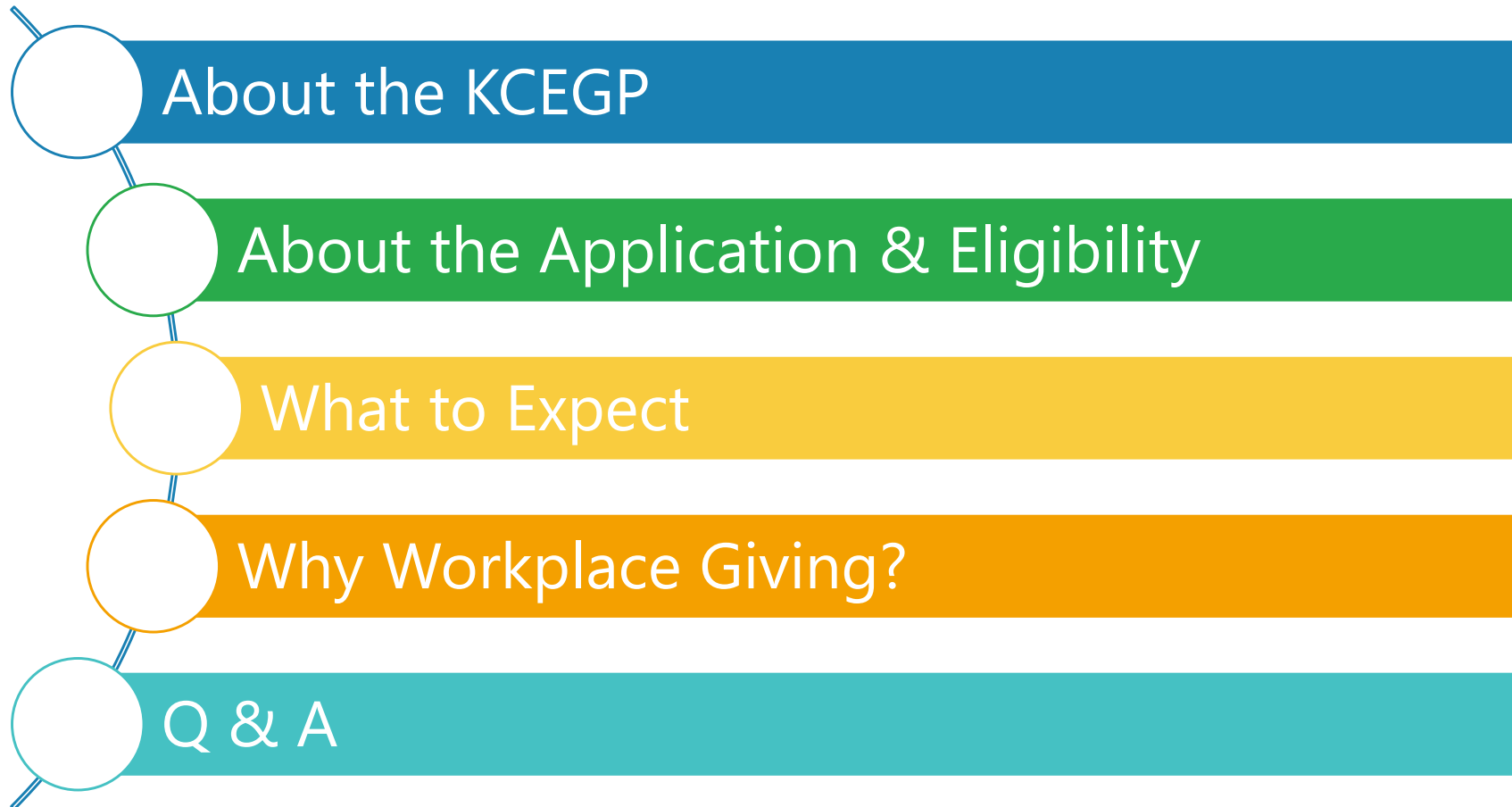


2023 Nonprofit Application Webinar



Employee Giving Program

Today's Agenda



About the KCEGP

- For employees of the government of King County.
- Year-round program: including natural disaster relief, volunteer, community partnerships and Annual Giving Drive.
- It is governed by King County Code.
- All charitable solicitations by and of King County employees must be done through the KCEGP.
- Employees may participate in several ways including:
 - payroll donation, time donation, direct check, credit card and up to three days sick leave for volunteering.



Our Story – When we give together, we change the world for the better.

2023
\$2.35 Million

Diversifying
ways our
employees can
engage

\$36 Million
Since 1988

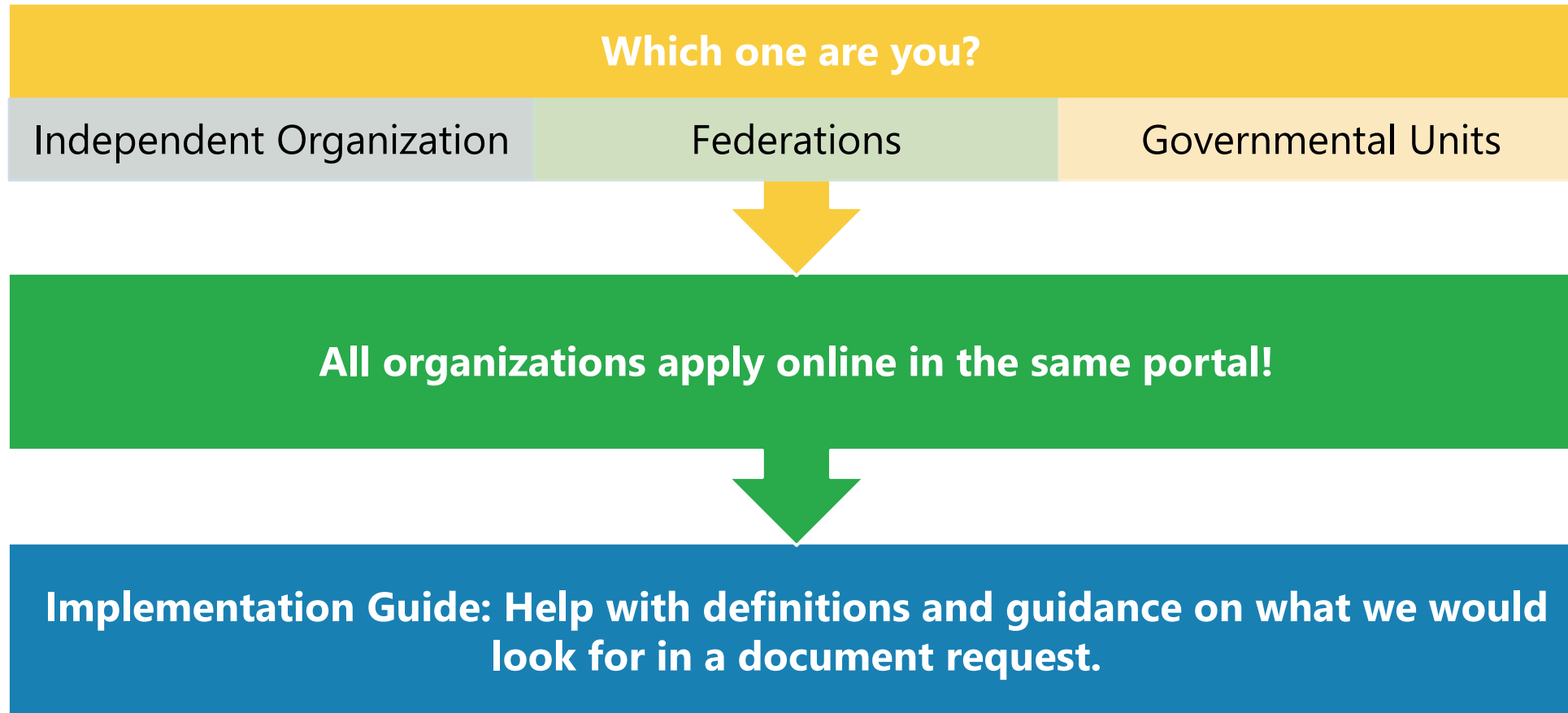
2nd highest
fundraising
public sector
employee
giving program
in WA

All Online Application

"If everything in my life was as easy as filling out the KCEGP application I would probably never have to use the ****BLEEP**** word ever again"



Applications



Functionality

Platform: Microsoft Dynamics Portal

- You can save and return
- Will see a visual warning for many eligibility requirements-telling you right away.
- Other team-members can review/collaborate before submission.

Returning organizations

- Most information pre-populated
- Use your log-in *or* an invitation code.
 - Invitation codes are one-time use. Not required if you already have a log-in.

Tips for Online Application

- Write down log-in information.
- Read the Implementation Guide.
- Have required attachment(s) ready ahead of time saved in a folder.
- Fields marked with an asterisk * are required.
- Submit EARLY!



Required Attachments

New Organizations

- ❑ King County W-9 (Do **NOT** use Federal W-9)
- ❑ Copy of IRS determination letter
- ❑ Screenshot of Washington Secretary of State Charitable Solicitations Registration showing Active Status and current renewal date.

Returning Organizations

- ❑ Screenshot of Washington Secretary of State Charitable Solicitations Registration showing Active Status and current renewal date.

However, documentation should be on file with organization to substantiate remaining requirements.



ORGANIZATION INFORMATION

Organization Name: Happy Today

FEIN Number: 911234567

UBI Nu

Registration Number: 123456

Federal Tax Exempt Status: Yes

Is this Organi
registered in the S

Also known as Names:

Name

Federal Status Type: 501(c)(3)

Washin

Happy Tomorrow

Jurisc

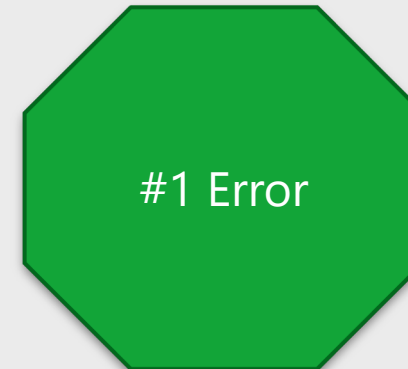
Status: Active

Purpose/Mission of the
Organization: To bring happiness to the world.

Renewal Date: 11/30/2023



Example SOS Screenshot



INTERNAL REVENUE SERVICE
P. O. BOX 1308
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: OCT 04 2002

Employer Identification Number:

EM:

Contact Person:

ID# 31294

Contact Telephone Number:

Letter Dated:

June 1998

Addendum Applies:

NO

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

You are required to make your annual information return, Form 990 or Form 990-EZ, available for public inspection for three years after the later of the due date of the return or the date the return is filed. You are also required to make available for public inspection your exemption application, any supporting documents, and your exemption letter. Copies of these documents are also required to be provided to any individual upon written or in person request without charge other than reasonable fees for copying and postage. You may fulfill this requirement by placing these documents on the Internet. Penalties may be imposed for failure to comply with these requirements. Additional information is available in Publication 587, Tax-Exempt Status for Your Organization, or you may call our toll free number shown above.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Letter 1998 (DC/CM)

Example IRS Tax Determination Letter



EMPLOYEE GIVING PROGRAM

NONPROFIT

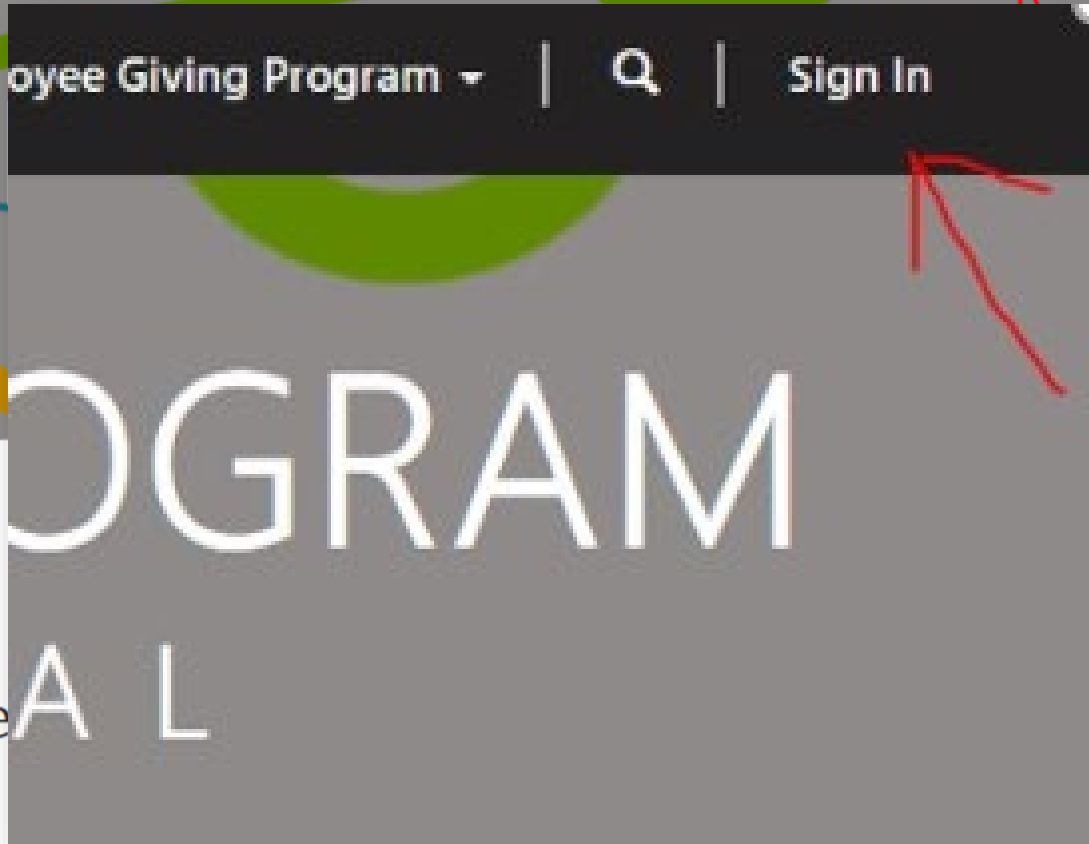
Program Details

Welcome to the King County Employee Giving Program

Nonprofit benefits at a glance

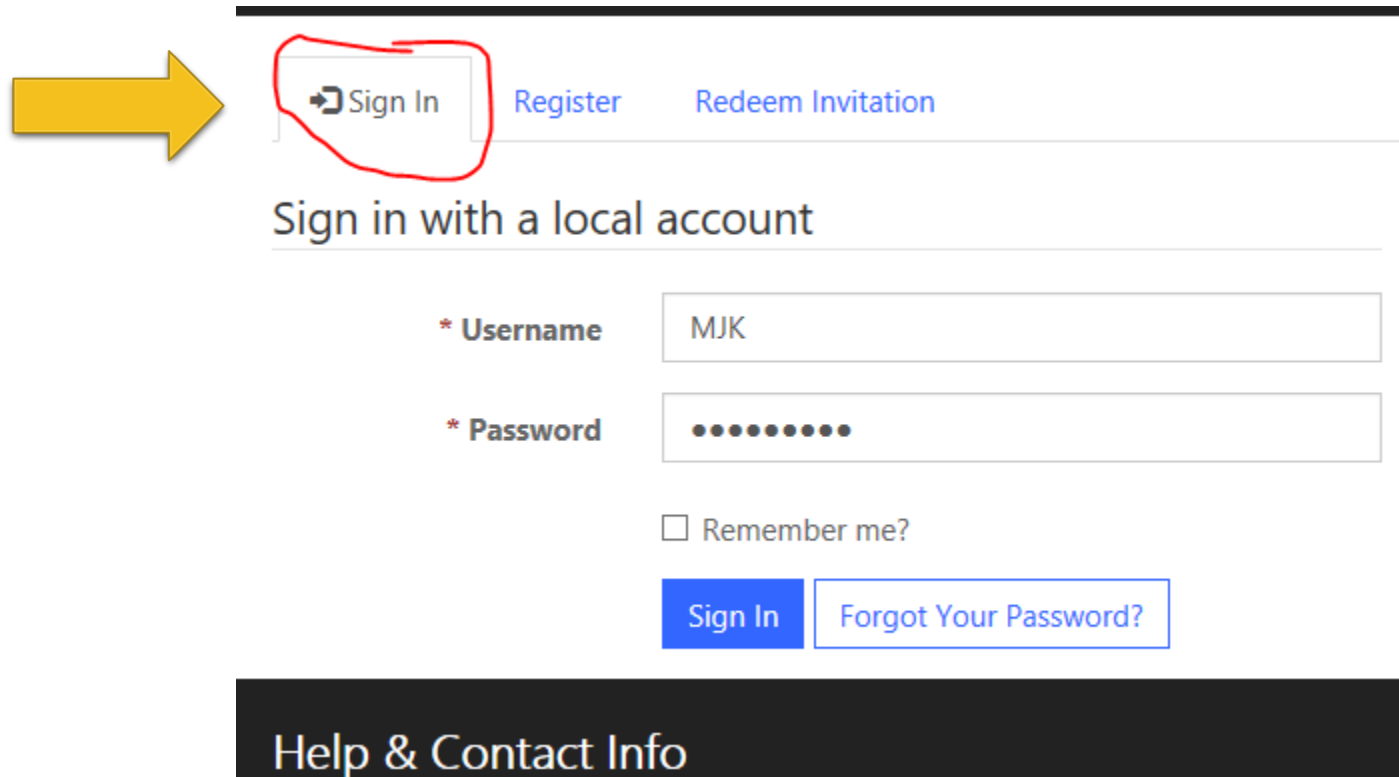
- Access to 14,000 King County Employees
- Donations and Volunteers
- Adoring fans for life

[View More](#)



Returning portal users

Sign-in using your username and password



A screenshot of a web portal sign-in page. A yellow arrow points to the 'Sign In' button, which is circled in red. To the right of the 'Sign In' button are links for 'Register' and 'Redeem Invitation'. Below the navigation bar is the heading 'Sign in with a local account'. The form contains two input fields: '* Username' with the text 'MJK' and '* Password' with masked characters. Below the password field is a checkbox for 'Remember me?'. At the bottom of the form are two buttons: 'Sign In' and 'Forgot Your Password?'. A black bar at the bottom of the page contains the text 'Help & Contact Info'.

[Sign In](#) [Register](#) [Redeem Invitation](#)

Sign in with a local account

* Username

* Password

Remember me?

[Sign In](#) [Forgot Your Password?](#)

Help & Contact Info

Forget Username?

Go to the Knowledge Base

Knowledge Base

All ▾ Search

Most Popular

Most Popular Articles

[Forgot Username?](#)

Provides instructions for a Portal User to recover their u

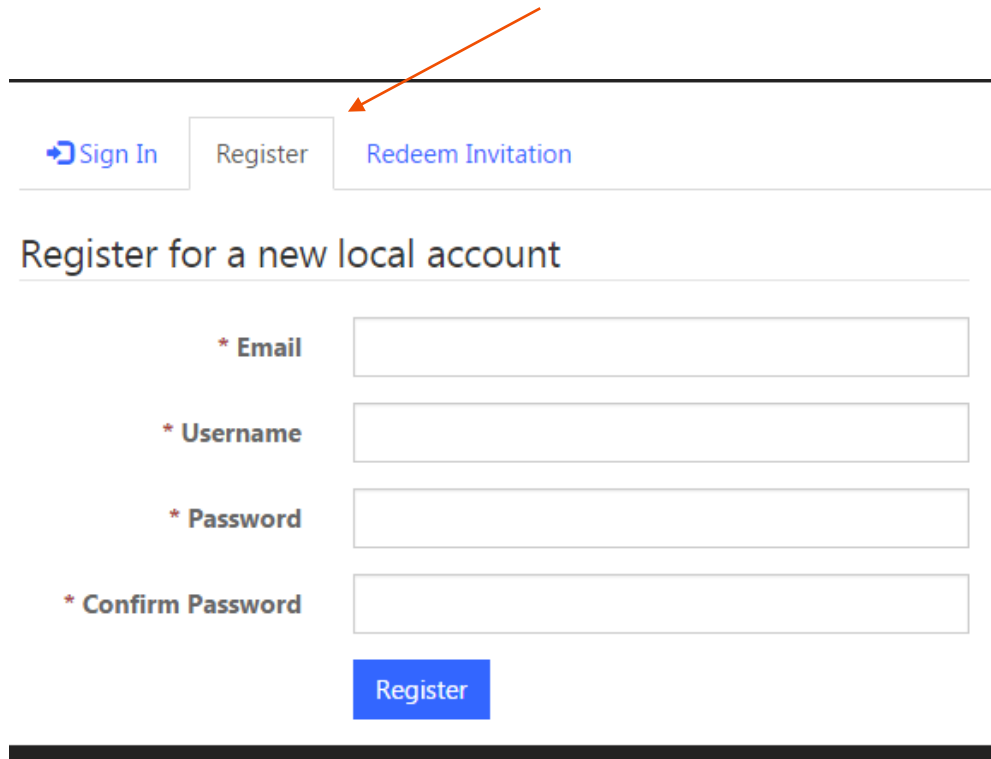
Most Popular Articles

[Forgot Username?](#)



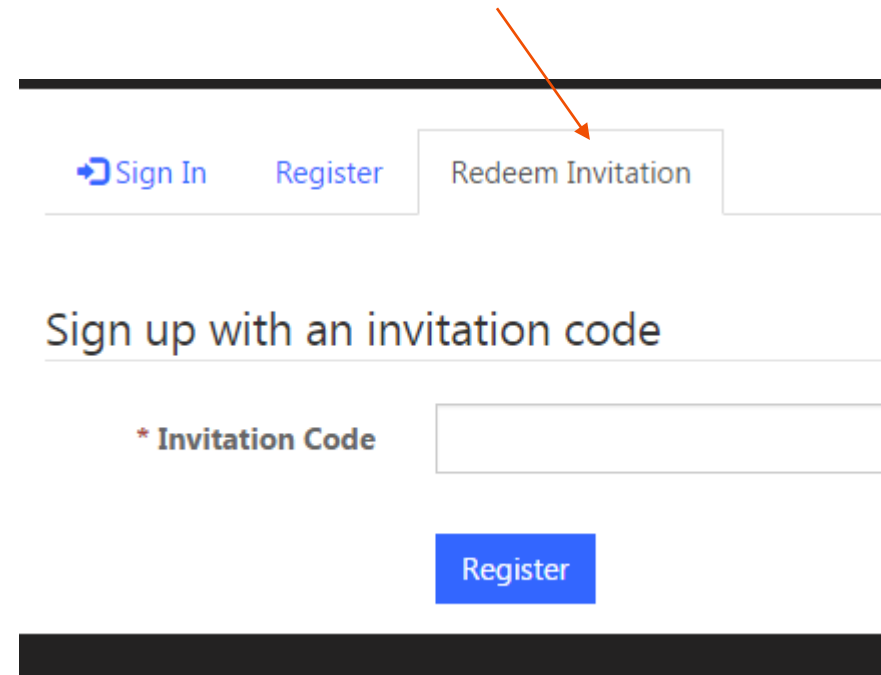
New portal users

No invitation code, click register



The screenshot shows a navigation bar with three buttons: "Sign In" (with a blue arrow icon), "Register", and "Redeem Invitation". An orange arrow points from the text above to the "Register" button. Below the navigation bar, the heading "Register for a new local account" is displayed. The form contains four input fields, each with an asterisk and a label: "* Email", "* Username", "* Password", and "* Confirm Password". A blue "Register" button is positioned at the bottom of the form.

Have invitation code, click redeem invitation



The screenshot shows a navigation bar with three buttons: "Sign In" (with a blue arrow icon), "Register", and "Redeem Invitation". An orange arrow points from the text above to the "Redeem Invitation" button. Below the navigation bar, the heading "Sign up with an invitation code" is displayed. The form contains one input field labeled "* Invitation Code". A blue "Register" button is positioned below the input field.

- nonprofits already in portal
- employee referrals

Profile



Junelle Kroontje

Profile

Nonprofit Information

Manage access

 Security

Change your password

Change your email address

Manage external authentication

Welcome!

[Want a quick primer? Check out the online demo here. \(9 minutes\)](#)

You can save and return at anytime - just remember your username and password!

This log-in is specific to you and will be linked to your organization.

Once you are all done, or if everything looks good, click update for the next step.

Tell us about you:

Your Information

First Name *

Junelle

Last Name *

Kroontje

Title

Chief Happiness Officer

E-mail *

Junelle.kroontje@kingcounty.gov

Mobile Phone

Business Phone

206-263-9405

Update



Update Profile

Your user
profile

Navigating the Portal

King County

Home > **Employee Giving Program**

Employee Giving Program

Employee Giving Program

- Application Overview
- New Organizations
- Returning Organizations
- Eligibility
- Frequently asked questions

▼ **Employee Giving Program**

- [Application Overview](#)
- [New Organizations](#)
- [Returning Organizations](#)
- [Frequently asked questions](#)

Welcome Do-Gooders! We're so glad you've decided to apply!

The King County Employee Giving Program (KCEGP) is the social impact program for employees of King County government. From our Annual Giving Drive to our Volunteer Benefit, there are several ways King County supports employees in whatever way they want to give back.

Our mission is to engage and develop our employees and deliver an innovative and effective comprehensive giving program to enrich our communities and provide opportunities for all people to thrive.

Participating nonprofits gain access to 15,000 King County employees, donations, and volunteers, as well as adoring fans for life!

Not sure if you're eligible? Still deciding whether to apply? [Click here to learn more about the program.](#)

Left Hand Navigation

Application Overview

- Employee Giving Program
 - Application Overview**
 - New Organizations
 - Returning Organizations
 - Frequently asked questions



Application Overview

Our goal is to help you successfully apply to be in our program! We have created lots of tools and are happy to help at any step along the way. Give us a call (206) 263-3646 or send us an email employeegiving@kingcounty.gov

2023 Application Cycle April 12 - May 4

- First time applying? We highly recommend you attend one of our [Application Workshops or watch the webinar](#).
- All nonprofits in our program must apply and meet our [eligibility requirements](#) annually. Successful completion of the application doesn't guarantee that you are [eligible](#), though we have built-in warnings on most fields that will indicate ineligibility based on a response.
- You are applying today for the program participation beginning in September 2023. The cycle ends with engagements through September 2024 and disbursements through 4th quarter 2024. [See a past example](#).
- Fields marked with a red asterisk are required.
- Submit EARLY so there is time for us to contact you to fix any problems with your application.
- By clicking the submit button on the last page, you are declaring under penalty of perjury under the laws of the State of Washington that all statements made in this application are true, complete and correct. Incomplete or ineligible

New Users – Activate Portal Account

New Organizations

Employee Giving Program

Application Overview

New Organizations

Returning Organizations

Frequently asked questions

How do I know if I am new or returning?

Returning organizations redeemed an invite code or you are on [this list](#).

New Organizations

First things first: Activate your Nonprofit Portal Account.

After you have created your personal log-in, you need to Activate the Nonprofit Portal Account. You only have to do this once, for as long as you are with us. It can take up to 24 hours for portal account requests to be approved.

Activate Portal Account

One time action

Once the nonprofit portal account is activated, you will receive an email and you will no longer be able to access the page via the button above.

Application

There are two parts to completing the application. Both sections are required.

1. [Account and contact information](#).
2. Eligibility and further information.

On Part 2: Eligibility you will need to upload three documents.

Tip Make a folder on your computer and save all three together.

Activate nonprofit portal account

Do you see the red error message "The record you are looking for couldn't be found" - [Sign-in or redeem your invitation code here.](#)

If you redeemed an invitation code, congrats! You are already set-seeing this page at all. In case you do though [Skip to Parts 1 and 2](#) this page again you will lose what is already in the system.

Setting up your account

Fill out the information below and click submit.

Once you have submitted a request for a nonprofit account it may take up to **24 hours** to be complete. You will be unable to submit an application until your nonprofit partner *Once complete you will receive an email to continue with Parts 2 and Steps 3.*

Once your nonprofit partner account has been activated:

[Go to Part 1](#)

CONTACT INFORMATION

Full Name *

Junelle Kroontje

Phone Number

Title

Email *

Junelle.Kroontje@kingcounty.gov

Nonprofit Account Details

Organization Name *

Nonprofit DBA Name *

Nonprofit Federal Tax ID *

Create Account



All Users: Nonprofit and Contact Info

On Part 2: Eligibility you will need to upload one document.

Tip Make a folder on your computer and it ahead of time.

1. PDF of the organization's listing on the Washington Secretary of State's website. [Click here to search](#). The renewal date should be on or AFTER April 25, 2018. If it is not, you will need submit your paperwork to the Secretary of State before finishing your application here.

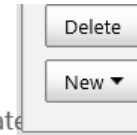
Important, new this year: The Secretary of State has changed the charities website and the letter they provide for verification. We believe that in the future it will be make verification much easier. Right now, however, it makes it slightly more complicated.

- *The new letter format from the Secretary of State can **not** be accepted. It does not verify current registration.*
- *There is no longer a unique URL to your specific listing on their website.*

The **website can** now be used for verification. However, because we can't link directly to your listing, you will need to make a PDF of the page and upload it with your application.

Continue to the application by clicking below:

Nonprofit and Contact Information



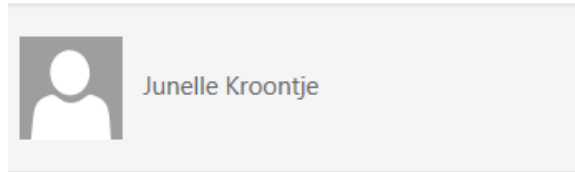
Part 1: Nonprofit and Contact Information

Ask yourself:
*How would a
potential donor
look for me?*



Part 1: Nonprofit and Contact Information


Nonprofit Information



Profile

Nonprofit Information

Manage access

 Security

Change your password

Change your email address

Manage external authentication

Part 1: Nonprofit and Contact Information

Fill out below and click the submit button. Please proofread!

This information will be used to populate marketing materials, communications, and other systems. Errors or omissions are the responsibility of the nonprofit.

This section can be updated all year long - though changes to nonprofit information may not show up immediately in our online database.

Once you see a green bar that says "Submission completed successfully" click on the "Go to Part 2" button:

[Go to Part 2](#)

Summary

Account Information

Nonprofit Legal Name *

Happy Today

Summary

Account Information

Nonprofit Legal Name *

House Stark

Doing Business As (DBA) Name

This is the name that will be published.

Stark

Federal Tax ID *

XX-XXXXXXX

34-5678901

King County Employee Giving Program Code

Assigned by King County

3456

Website *

If no website, put www.no-web

<http://www.kingcounty.gov>

Facebook Page

Nonprofit Short Description

150 characters, without spaces, do NOT include nonprofit name, we will put it right above. The 180 character counter below includes spaces.

180 characters remaining

Stark desc

Physical Address

456 Blvd Suite 1000
Puyallup WA 98446

Mailing Address

456 Blvd Suite 1000
Puyallup WA 98446

Check Address

Check Address: Street 1

This is where checks should be mailed.

456 Blvd

Check Address: Street 2

Suite 1000

Contact Information

Contacts

Add New: click the blue create button

Edit current: click the blue arrow next to the contact.

There is no limit to the number of contacts. However, only three can be assigned to the primary roles below.

Contacts (Company Name)

Full Name ↑ **Email** **Company Name** **Business Phone**

There are no records to display.

Primary Contact *

This is the main person we will contact if we have questions, need more information, or have information to share with you.

Secondary Contact

Finance Contact

Please provide contact information for the person who needs donor reports and check information.



Part 1: No Informatic

Fill out below and click the

This information will be used
omissions are the responsibi

This section can be updated
immediately in our online da

Once you see a green bar th



Part 2: Eligibility and other info

Home > Eligibility

Eligibility

Welcome!

There are 2 parts to this application:

1. Nonprofit Information
2. Eligibility

This is **Part 2: Eligibility**

Check your progress below:

- Profile Information
- Non-Profit Information
- Eligibility

New: Begin Step 2

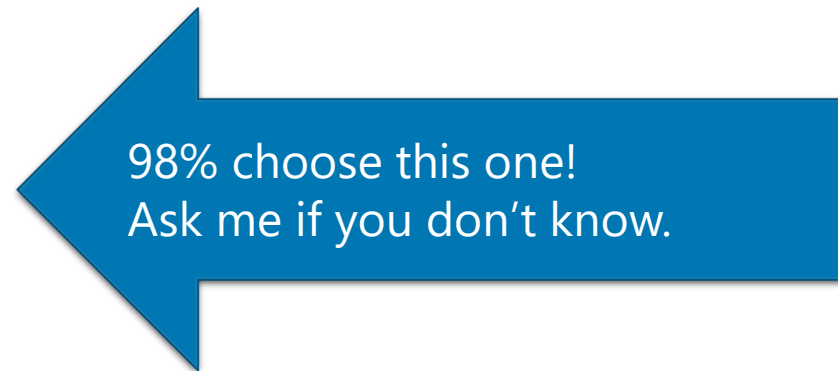
Part 2: Eligibility Form

| Applicant Customer | Status Reason | Employee Giving Campaign ↑ | |
|--------------------|---------------|----------------------------|--------------------------|
| Happy Today | In Progress | 2018 Campaign | <input type="checkbox"/> |

Returning or Review:
Application in progress

Choose Application Type

- Federation,
- Government, or
- Independent



Other Information

- Service Categories
- Communities Served
- Links to Nonprofit Rating agencies

Part 3: Eligibility and other information

Step 2 of 9

Service Categories

Please indicate your top three organizational purposes using the service category options below.

Choice 1 should be your primary category of service. This is where your main listing will be and tied to results reporting.

| | | |
|---------------------------------|----------|----------|
| Choice 1 - Primary Category * | Choice 2 | Choice 3 |
| Emergency & Disaster Services ▼ | ▼ | ▼ |

Previous

Next/Save

Eligibility Information

Step 4 of 9

Eligibility Information

Tax-Exempt Status: Do you affirm that this nonprofit is formally recognized by the IRS as having tax-exempt status under section 501 (c)(3) of the Internal Revenue Code? *

Yes

Charitable Solicitations Registration: Do you affirm that this nonprofit is registered with the Washington Secretary of State as required under RCW chapter 19.09, the Charitable Solicitations Act? *

Yes

Previous

Next/Save

Eligibility Requirements



RECOGNIZED BY THE IRS AS
HAVING TAX-EXEMPT STATUS
UNDER SECTION 501(C)(3) OR IS
A GOVT UNIT OF THE STATE OF
WASHINGTON



CURRENT REGISTRATION WITH
THE WASHINGTON SECRETARY
OF STATE CHARITABLE
SOLICITATIONS OFFICE RCW
19.09



AFFIRM ADHERENCE TO, OR
CLAIM A LEGAL EXEMPTION
FROM THE
NONDISCRIMINATION POLICY



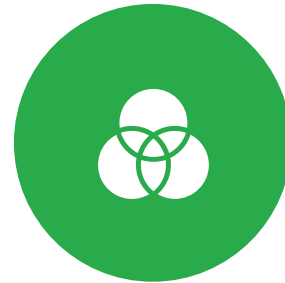
TURN IN A COMPLETE AND ON-
TIME APPLICATION

Eligibility Requirements Cont.



Providing or conducting real services, benefits, assistance, or program services for **2 years**.

Revised!



Active governing body (board) whose members have affirmed adherence to a conflict-of-interest policy and a majority of whom serve without compensation; and any compensated members do not serve as the board's chair or treasurer

Eligibility Requirements - Finances



- ✓ Annual financial statement prepared in accordance with generally accepted accounting principles (GAAP).
- ✓ Tiered Financial Review Requirements:

| Annual Gross Income | Financial Review Requirement for Preceding Accounting Year |
|--|---|
| > \$3 million averaged over 3 years | (b) An audited financial statement prepared by an independent certified public accountant |
| If does not meet above then preceding accounting year: ≥ \$1 million | (a) The federal financial reporting form (e.g. 990, 990PF, 990EZ, 990T) the organization normally files with the IRS which must be prepared by a certified public accountant or other professional who normally prepares such forms in the ordinary course of their business; <u>or</u> (b) An audited financial statement prepared by an independent certified public accountant. |
| Less than \$1 million | Internally produced financial statement presented to the governing body (board of directors). |

Eligibility: Certifications



IN COMPLIANCE WITH
WA LAWS.



WON'T SELL OR
DISTRIBUTE DONOR
LISTS.



PROVIDE
DOCUMENTATION
UPON REQUEST.



TRUTH IN ADVERTISING.



USE OF MATERIALS &
INFORMATION FOR
MARKETING.



ELIGIBILITY REVOCATION
IN CASES OF FRAUD
AND CHANGE OF
STATUS.



COMPLIANCE WITH US
REGULATIONS AND
OFAC.



APPLICATION IS TRUE
AND CORRECT

Blocked Persons subject to such sanctions, and overviews and guidelines for each such sanctions program can be found at www.treas.gov/ofac. Should any change in circumstances pertaining to this certification occur at any time, the organization will notify the King County Employee Giving Program immediately.

- Meets the basic standards and criteria as set forth in the King County Code chapter 3.36, and in the KCEGP Public Rules, both of which govern the KCEGP and are represented in this application, and that the information provided in this application, including all hard copy and electronic attachments, is true and correct and this application has been properly certified by an authorized officer of the organization.
- By signing this application, I hereby authorize that any information included in this application may be used in any KCEGP materials including, but not limited to, print materials and the website, and may be given to the KCEGP donor base.

By clicking on the submit button below, I, declare under penalty of perjury under the laws of the State of Washington that the forgoing is true, complete, and correct.

Authorized Officer certifying the application *

Name of the person electronically signing this application *

Contact to receive email confirmation *

Note Text

There are no notes to display.

Previous

Submit

Submit!

Submission completed successfully.

Turn IN!

Applications Due:
May 4, 2023

What to expect?

- If you make a mistake, we will reach out to you to give you a chance to fix.
- Notifications by July

Annual Giving Drive Nonprofit Cycle

2017 Annual Giving Drive Cycle

March - April
2017

- Apply here for 2017 AGD

October -
November 2017

- 2017 Annual Giving Drive (AGD)

January 2017-
January 2018

- Distributions that result from 2017 AGD

It is possible to receive checks from the 2017 cycle and not be in/eligible for the 2018.

Around the same time you are receiving your first checks from the 2017 cycle, the application process will begin for 2018.

March 2017

2017

January 2018-2019

2018 Annual Giving Drive Cycle

March - April
2018

- Apply here for 2018 AGD

October -
November 2018

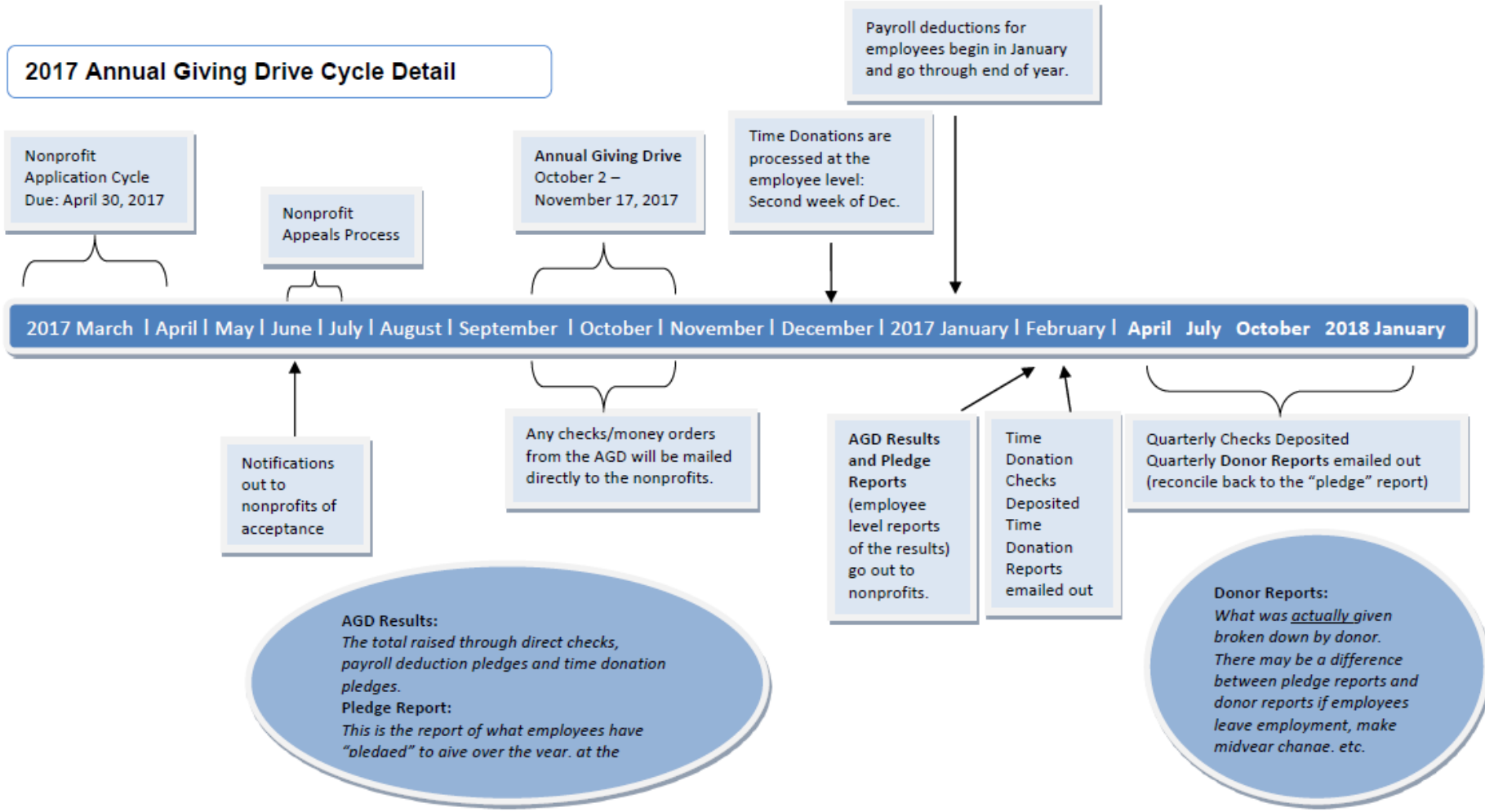
- 2018 Annual Giving Drive (AGD)

January 2018-
January 2019

- Distributions that result from 2018 AGD

Please note: Nonprofits must reapply for each new cycle. Write-ins are not allowed and donations will not be processed for nonprofits not in the program.

Annual Giving Drive:
The time of year when employees are making their annual elections for who they would like to give to through payroll deduction, time donations, and/or direct checks. It is also the time of year when nonprofits can come in and speak at worksites, have a table at the Nonprofit Expo, and when employees may hold special events.



Engagement & Marketing

Assumptions:

- We have more than 15,000 Employees.
- 1/3 are working remotely, 1/3 are hybrid, 1/3 are on site.
- We anticipate more in-person events this year along with continued virtual engagement.

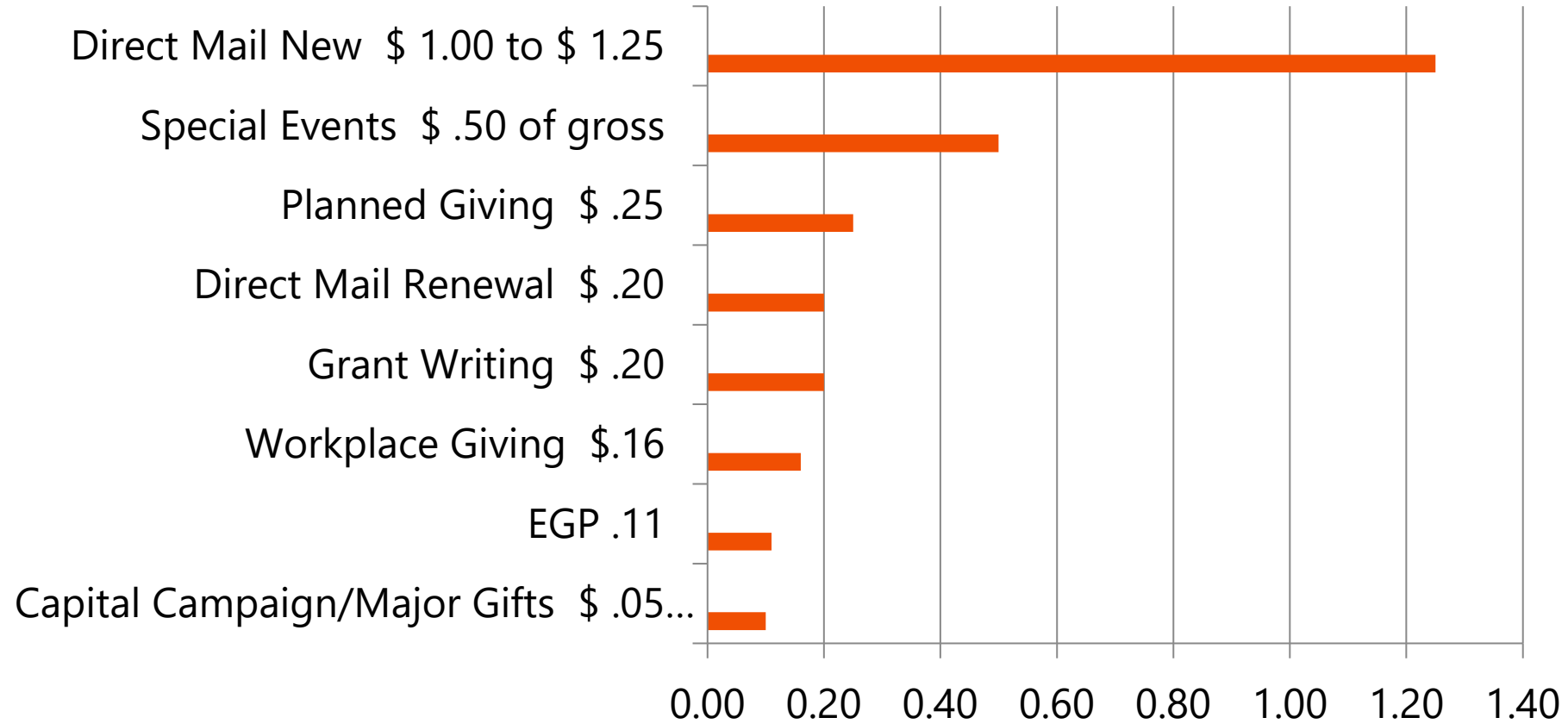
Engagement Opportunity Focus:

- Online Expos & Presentations
- Videos and YouTube Playlist
- Virtual Nonprofit Discovery
- If you are creating marketing material for one place – use it for every other place!
- Speaking at meetings

Why Workplace Giving?



National Average cost to raise a \$



Source: James Greenfield, Fund-Raising: Evaluating and Managing the Fund Development Process (1999), Charity Navigator, and KCEGP

Low-Cost

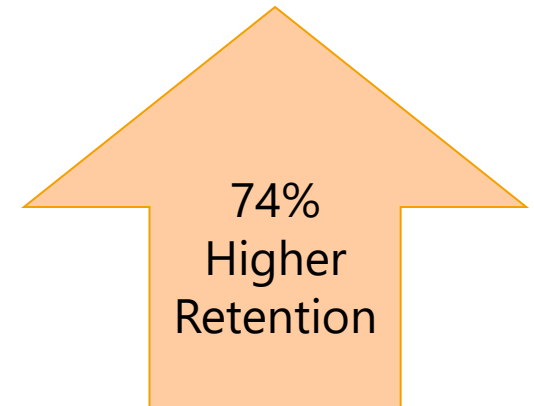
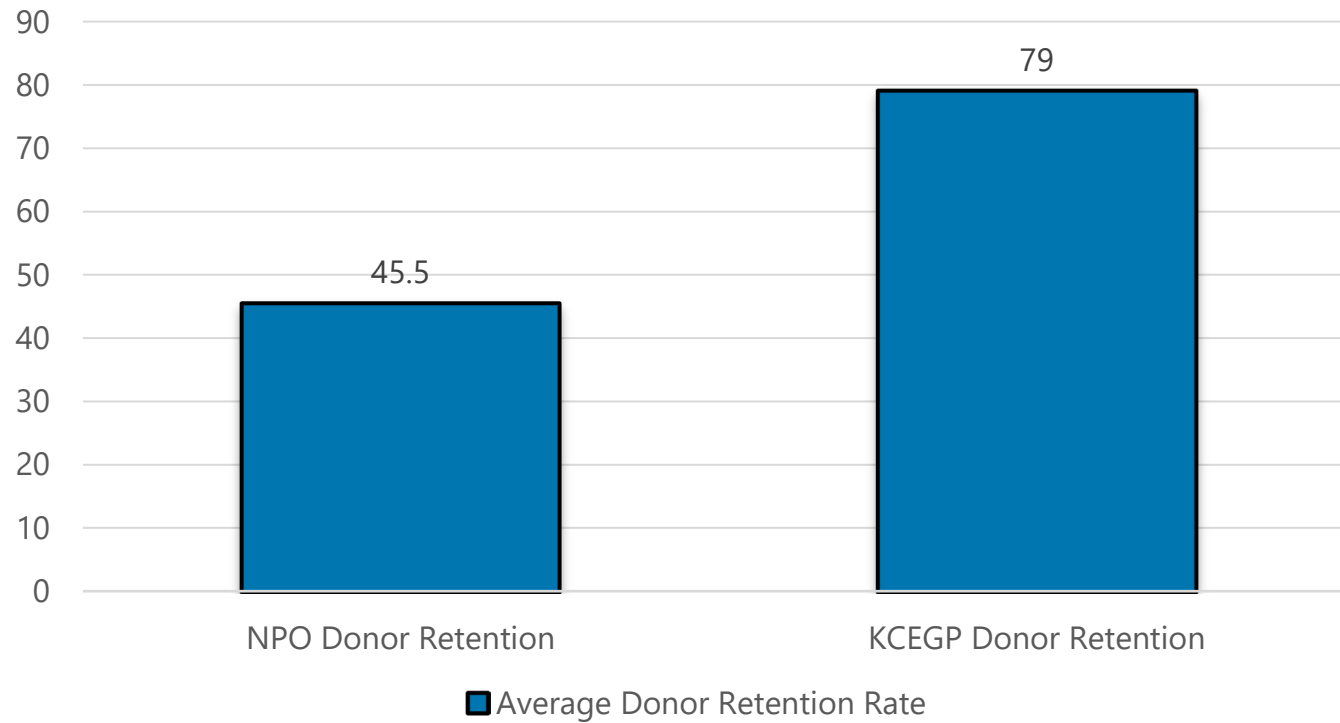
Average Cost to Raise and Administer a \$1.00



Source: Charity Navigator, and KCEGP

Higher Retention

Average Donor Retention Rate



Benefits



Unique Revenue Source – Time Donation.



Unrestricted Gifts – use where most needed.



Donor–Centric: Can give all in one place, one time, can remain anonymous and still have everything for taxes, seamless.



Efficient – One report and one check for you saving you staff time and energy.



Low risk– No upfront cost other than the application.



Low attrition over the year and higher retention year over year.

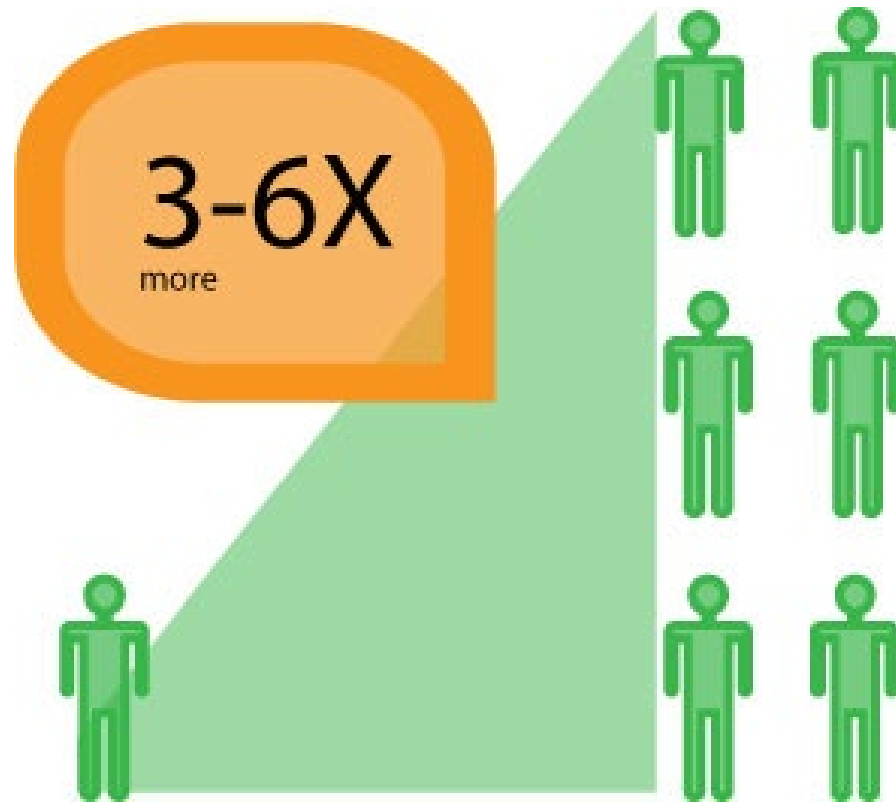


Marketing presence & leverage.



Volunteer programming.

The Power of Payroll Donation



Move from
buying a book to
building a
library.

Questions?

www.kingcounty.gov/giving
employeegiving@kingcounty.gov
(206) 263-3646