

CITY OF NEW ORLEANS
CHIEF ADMINISTRATIVE OFFICE

POLICY MEMORANDUM NO. 68 (R)

AUGUST 8, 1986

TO: All Departments, Boards, Agencies and Commissions

FROM: Kurt D. Steiner, Chief Administrative Officer

SUBJECT: CLEARANCE FOR SPECIAL ACTIVITIES AND FUND RAISING

1. PURPOSE.

This policy establishes procedures for special activity or event clearance and continues the practice of quarterly financial reports on special activities. The policy is revised to include events to raise funds for the City.

2. PROCEDURE.

- A. Any special activity which requires an expenditure of City funds or manpower must be approved by the Chief Administrative Office and the Mayor's Office. These approvals shall apply to special events or activities sponsored by outside groups or individuals which mandate City involvement. CAO and Mayor's Office clearance shall also apply to any City group sponsored events.
- B. Departments or agencies wishing to sponsor an activity to raise funds for the City must receive the approval of the Chief Administrative Office and the Mayor's Office before proceeding. Prior approval is also required for fund raising activities sponsored by outside groups or individuals if the fund raisers are to have City involvement or will be represented as to have City involvement or will be represented as having the approval of the City. A department or agency contemplating a fund raising activity should contact the Mayor's Office for additional information.
 - 1. Departments and agencies are reminded that monies acquired through fund raising events are revenues to the City and must be deposited into the financial management system (FMS) in a revenue code before being appropriated into the budget. The final decision on the distribution of the funds will be made by the budget office and the Council.
 - 2. Funds raised through activities sponsored by outside agencies (charitable organizations, private citizens, corporations, etc.) are donations to the City and must receive the recommendation of the Board of City Trusts before acceptance by the City Council (Home Rule Charter, Section 5-402). All such donations must be forwarded

to the Director of Finance for review by the Board of City Trusts.
In-kind donations must also be reviewed by the Board of City Trusts.

- C. Attached to this memorandum is a form which must be submitted for review before City involvement/participation in a special event or activity, including those given to raise funds for the City. Approval must be obtained before the City agency initiating the form makes any commitment. The form should include the name and telephone number of the departmental employee who shall be responsible for routing the form through each level of clearance. The form should be sent first to the Assistant CAO for Management, Audit and Special Projects, then to the Mayor's Executive Assistant for Human Resources, and lastly to the Director of the Mayor's Office of Public Information.

3. QUARTERLY REPORT.

- A. Quarterly reports must be submitted to the Administrative Office. The reports must be submitted no later than two weeks after the close of each quarter.
- B. All expenditures must be reported in terms of major expenditures classifications: Personal Services, Contractual Services, Supplies and Materials, Equipment and Property.
- C. Personal services must include a breakdown of costs incurred as a result of both regular time and overtime. The number of personnel is to be limited to those employees who actually performed duties directly related to the activity.
- D. For each activity, indicate whether this is a one-time event, or a cyclical event such as Mardi Gras, or a school fair which could recur in subsequent periods. It must also be noted whether or not funds have been specifically budgeted for the event.

4. INQUIRIES.

Any questions concerning this memorandum should be addressed to the Chief Administrative Office.

KDS:LRF:ch

