All charities in the Commonwealth of Virginia Campaign (CVC) must apply each year. To do so, go to the website at www.cvc.virginia.gov and select APPLY NOW or go to For Charities and Select Application.

If you are a new charity – never part of CVC – or you have been out of the CVC for 3 years or more, or if you were part of a federation and you are now independent/unaffiliated or you changed federations, you are a NEW Charity. (We'll cover Returning Charities later on)

1. Click on the Blue Box that says "New Charity." You will get a screen with the following information.



Welcome New Charities

In order to complete this application, you will need a **CVC CODE** and **PIN Number** (apply below), your most recently completed **IRS 990 or 990EZ tax form**, your **Virginia Department of Agriculture and Consumer Services registration status**, a **25 word mission statement for your organization** and **some general program information**.

All applicants must have a 501.C.3 tax exempt status with the Internal Revenue Service (IRS), with the exception of volunteer fire or rescue departments, which may be 501.C.4. Charities must be registered with the IRS as a C.3 or a C.4 for at least one year prior to participating in the CVC.

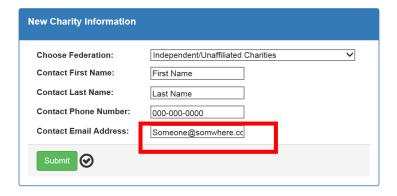
New charities and charities that have changed their DBA (Doing Business As) must complete and mail:

- an EBA (<u>Electronic Business Agreement</u>) signed by your CEO or CFO [Mail to CVC/DHRM, 101 N. 14th Street – 12th Floor, Richmond VA 23219]
- register with the Virginia Department of Agriculture and Consumer Services (VDACS) [It can take several months to get your approval from VDACS, but if you have applied within the last 6 months, you may proceed with the application.]

Information on VDACS may be found on their website at http://www.vdacs.virginia.gov including a toll-free phone number. Online CVC Applications (for all charities) are due *annually* on April 30th or they will be rejected. [For 2017, the deadline is May 5]

VDACS registration is required each year unless VDACS has sent you a letter of <u>Exemption from Annual Registration</u>. Charities without VDACS approval by August 1st of the campaign year may be excluded from the campaign. <u>All applicants are responsible for submitting an accurate and complete application</u>. <u>Incomplete fields or inaccurate data or statement may cause your application to be rejected</u>.

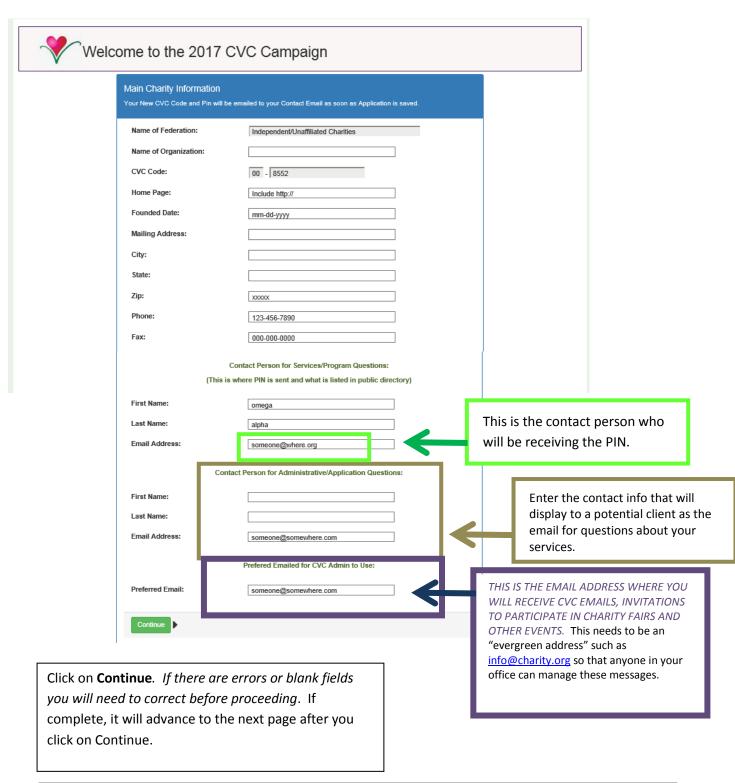
- 2. If your charity is affiliated with a federation (grouping of charities), do not fill out this form unless directed to do so by your Federation. You will need to use your Federation's PIN. If you are independent/unaffiliated, go to step 4.
- 3. Simply *contact your federation* (i.e. United Way, Share America, Neighbor to Nation, etc.) to determine if they will submit an application on your behalf. You can search for your federation here. If they ask you to enter your application, request the Federation PIN from them.
- 4. Otherwise, please fill out the information below to proceed to your application. Your PIN number and CVC Code will be sent to you via the email address (see red box) listed below. If you need to return and edit your application, please do so as a Returning Charity using the PIN number and CVC Code in this email.
- 5. If you are a federation filing for a new charity, please choose your Federation name below. All others, please choose "Independent/Unaffiliated Charities" from below

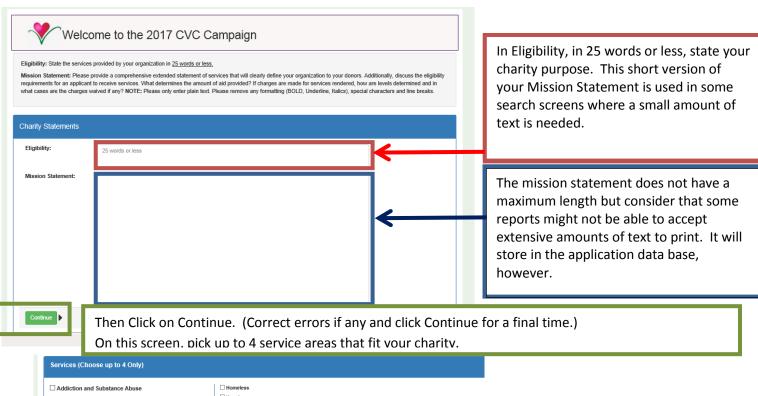


When this screen is completed, click on **Submit** (this does not submit your entire application but it sends information to this point that is processed).

Go to the next page in this guide.

Next Screen:





☐ Adoption (Child) ☐ Human Rights Adoption (Pets) ☐ Hunger ☐ Aging ☐ Animal Protection and Services ☐ International Human Rights ☐ Arts, Culture and Humanities ☐ International Peace and Security □ Broadcasting ☐ Child and Youth Development ☐ Legal Services Libraries ☐ Civil Rights and Liberties ☐ Literacy Community Improvement ☐ Mental Health ☐ Conservation ☐ Museums ☐ Disabilities ☐ Natural Disasters and Catastrophes ☐ Disaster Relief ☐ Needy Families ☐ Disease and Disease Research ☐ Peace ☐ Domestic Violence ☐ Performing Arts ☐ Poverty □ Education ☐ Emergency Relief and Shelter ☐ Public Safety ☐ Employment ☐ Recreation and Sports ☐ Environmental Beautification and Horticulture ☐ Rural Concern ☐ Environmental Conservation or Preservation Safety and Security ☐ Faith-Based Services □ Services to Military/Veterans ☐ Transportation ☐ Health Care Facilities and Programs ☐ Womens issues ☐ Health Education ☐ Health Research Continue ☐ Historical Preservation ☐ Homeland Security

These service areas are used by clients or donors who want to find charities that provide up to four of their services needed and in clicking on search screens, it will provide a list of all charities that fit those qualities. You may select 1, 2, 3, or 4. You only have to match one service to be selected in a search.

When Done, click on CONTINUE. If you selected more than four service areas, it will wipe out your choices in this section and you will have to re-click up to 4 charities.

When you click on Continue it will take you to the next screen.

Enter the regions or areas to which/in which you National
 ■ National
 ☐ International provide services. If you serve the entire state, it is ☐ Region 1 better to select all the regions instead of just the ☐ Region 2 ☐ Region 3 state. Many donors are looking for charities that ☐ Region 4 serve clients in the area in which they work or ☐ Region 5 ☐ Region 6 live. ☐ Region 7 Click Continue to advance to the next screen.



Administrative/Fundraising Costs The combined Administrative/Fundraising costs incurred by this organization is based on the following Tax Year: 2016 ∨ Tax Form: 990 EZ ✓ Management Expense is the overhead that is not directly used to provide services to your clients. This is usually the CEO's salaries and anything that is simply just for him/her. Any other administrative salaries that are not involved in providing services. Fund Raising Costs as used differently. Fliers printed for a fund raiser would go here. Just educational use materials would not be included. Total Revenue is the total of all sources of revenue to the charity Please DO NOT use currency signs when entering these numbers. You MUST complete and print a copy of this worksheet for your files. Random audits will be performed to insure that applicants are complying with this requirement Manage Expense: Fund Raising Cost: Total Revenue: calculate even if all zero's Expense Percentage: 0.00% Participation I would like to be a part of the CVC Speaker Bureau. Please contact us to participate in the agency fairs and other activities. Final Review

As a NEW charity – <u>this is the most important section for special attention to accuracy</u>. The maximum overhead expense rate to be accepted is **25%**.

For Tax Year and Tax Form, you can use 2016, 2015, or 2014 year data. (past three years)

Please enter whole numbers without commas or \$ signs. These are all dollar figures and not thousands of dollars. If your Total Revenue was \$1,123,456, enter it as 1123456 and not as 1123 (if assuming thousands of dollars).

Enter Management Expense – Read the note on the screen. For example, If your CEO also provides services 40% of the time and does administrative work 60% of the time, enter 40% of the salary expenses associated with his/her work with the charity services.

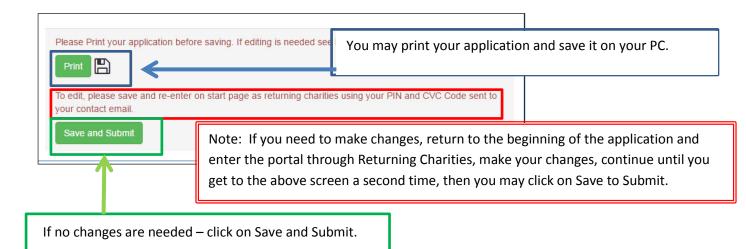
Fund Raising Costs include rental of a venue or facility for a fund raising event, printed materials associated with the event that are not usable after the event, and cost to hire professionals to help with the event.

DO NOT TRY TO ENTER THE EXPENSE PERCENTAGE.

Click on CALCULATE EXPENSE and it should give you a percentage in the designated box.

Under Participation, please check the box if you want to be a speaker at CVC events or want to be in a charity fair hosted by a state agency.

CLICK ON FINAL REVIEW. Your complete application display at this point). It has not been saved yet.



If you are satisfied, click on Save and Submit – You are **Done!**You will be notified by May 31 about the status of your application.



DEFINITION OF TERMS

1. Eligible Charity

A 501(c)(3) non-profit or 501(c)(4) with IRS documentation to support their status. They must register with the CVC and VDACS each year.

2. Financial Eligibility

First time applicants (or applicants who were not in the CVC campaign last year) must have no more than 25% in operational expenses in the most recent 1990 form.

- a. Applicants applying for the **second** consecutive year must have no more than 25% in operational expenses in the most recent I990 form AND they must have received a minimum of \$250 in designated gifts, including any Direct Gifts. This information is generally posted on the website in early May.
- b. Applicants applying for the **third (or more)** consecutive year must have no more than 25% in operational expenses in the most recent I990 form AND they must have received a minimum of \$750 in designated gifts, including any Direct Gifts. This information is generally posted on the website in early May.

Charities must meet the criteria in #1 and #2 above to be considered eligible and they must submit a complete application on line through the CVC Application Portal by the deadline posted on the website.

3. Federation

A federation consists of two or more charities that operate under the federation's "umbrella" and meet their federation's requirements as well as CVC requirements.

Examples of federations are "United Way of xxx," "Global Impact," and others.

Many federations provide support services for their members and some deduct a small fee from CVC checks to the federation before distribution to their members. Most federations enter the member charities applications on their behalf and a few ask the members to enter their own application – in which case the member charity needs to obtain the federation PIN code before entering. If you are not sure, contact the federation liaison to discover the preferred process.

4. PIN Code

When accessing your ATM, the PIN (personal identification number) is a security code is issued only to authorized independent charities and federations of charities. CVC PINS do expire after about 60 days, but you may request a new one under the Returning charity portal.

WE NO LONGER MAIL PIN CODES for security purposes.

5. EBA (Electronic Business Agreement) http://www.cvc.virginia.gov/charities/electbusagree.pdf is the location for these documents. New charities must print, sign, and mail the original signed

document to the address on the form. Otherwise, we require a new EBA every ten years (next time is 2020) or when your CEO or CFO changes or your name changes.

For more information, go to www.cvc.virginia.gov and click on For Charities and then "How to Become a CVC charity" or "Charity Guidelines". We appreciate your feedback at CVCStaff@dhrm.virginia.gov.

Other Resources:

How to Become a CVC Charity: http://www.cvc.virginia.gov/charities/howtoapply.pdf

Charity Guidelines & Procedures: http://www.cvc.virginia.gov/charities/CharityProcedures.pdf

EBA – Electronic Business Agreement: http://www.cvc.virginia.gov/charities/electbusagree.pdf

FAQs: http://www.cvc.virginia.gov/faqs.html

Contact us at: www.cvc.virginia.gov