Commonwealth of Virginia Campaign (CVC) Charity Application Guide for NEW Charities

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 to the 2017 CVC Campaign

New Charity

New Charity: You are considered a new charity if you have never applied to CVC before.

New Charities

Returning Charity

Returning Charity: You are considered a returning charity if you have a CVC code from a previous year.

Returning Charities

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. <u>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.</u>

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

- an **EBA** (Electronic Business Agreement) - 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.]

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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 Exemption from Annual Registration. Charities without VDACS approval by August 1st of the campaign year may be excluded from the campaign. All applicants are responsible for submitting an accurate and complete application. Incomplete fields or inaccurate data or statement may cause your application to be rejected.

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:

Welcome to the 2017 CVC Campaign

Main Charity Information
Your New CVC Code and Pin will be emailed to your Contact Email as soon as Application is saved.

Name of Federation: Independent/Unaffiliated Charities

Name of Organization:

CVC Code: 00 - 8552

Home Page: Include http://

Founded Date: mm-dd-yyyy

Mailing Address:

City:

State:

Zip: xxxxx

Phone: 123-456-7890

Fax: 000-000-0000

Contact Person for Services/Program Questions:
(This is where PIN is sent and what is listed in public directory)

First Name: omega

Last Name: alpha

Email Address: someone@where.org

This is the contact person who will be receiving the PIN.

Contact Person for Administrative/Application Questions:

First Name:

Last Name:

Email Address: someone@somewhere.com

Enter the contact info that will display to a potential client as the email for questions about your services.

Prefered Emailed for CVC Admin to Use:

Preferred Email: someone@somewhere.com

THIS IS THE EMAIL ADDRESS WHERE YOU WILL RECEIVE CVC EMAILS, INVITATIONS TO PARTICIPATE IN CHARITY FAIRS AND OTHER EVENTS. This needs to be an "evergreen address" such as info@charity.org so that anyone in your office can manage these messages.

Continue ▶

Click on **Continue**. *If there are errors or blank fields you will need to correct before proceeding*. If complete, it will advance to the next page after you click on Continue.

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Guide for NEW Charities

♥ Welcome to the 2017 CVC Campaign

Eligibility: State the services provided by your organization in 25 words or less.

Mission Statement: Please provide a comprehensive extended statement of services that will clearly define your organization to your donors. Additionally, discuss the eligibility requirements for an applicant to receive services. What determines the amount of aid provided? If charges are made for services rendered, how are levels determined and in what cases are the charges waived if any? **NOTE:** Please only enter plain text. Please remove any formatting (BOLD, Underline, Italics), special characters and line breaks.

Charity Statements

Eligibility:

    25 words or less

In Eligibility, in 25 words or less, state your charity purpose. This short version of your Mission Statement is used in some search screens where a small amount of text is needed.

Mission Statement:

The mission statement does not have a maximum length but consider that some reports might not be able to accept extensive amounts of text to print. It will store in the application data base, however.

Continue ▶

Then Click on Continue. (Correct errors if any and click Continue for a final time.)
On this screen, pick up to 4 service areas that fit your charity.

Services (Choose up to 4 Only)

- ☐ Addiction and Substance Abuse
- ☐ Adoption (Child)
- ☐ Adoption (Pets)
- ☐ Aging
- ☐ Animal Protection and Services
- ☐ Arts, Culture and Humanities
- ☐ Broadcasting
- ☐ Child and Youth Development
- ☐ Civil Rights and Liberties
- ☐ Community Improvement
- ☐ Conservation
- ☐ Disabilities
- ☐ Disaster Relief
- ☐ Disease and Disease Research
- ☐ Domestic Violence
- ☐ Education
- ☐ Emergency Relief and Shelter
- ☐ Employment
- ☐ Environmental Beautification and Horticulture
- ☐ Environmental Conservation or Preservation
- ☐ Faith-Based Services
- ☐ Health
- ☐ Health Care Facilities and Programs
- ☐ Health Education
- ☐ Health Research
- ☐ Historical Preservation
- ☐ Homeland Security

- ☐ Homeless
- ☐ Housing
- ☐ Human Rights
- ☐ Hunger
- ☐ International Development and Relief
- ☐ International Human Rights
- ☐ International Peace and Security
- ☐ Jails/Prisons
- ☐ Legal Services
- ☐ Libraries
- ☐ Literacy
- ☐ Mental Health
- ☐ Museums
- ☐ Natural Disasters and Catastrophes
- ☐ Needy Families
- ☐ Peace
- ☐ Performing Arts
- ☐ Poverty
- ☐ Preparation or delivery of meals
- ☐ Public Safety
- ☐ Recreation and Sports
- ☐ Rural Concerns
- ☐ Safety and Security
- ☐ Services to Military/Veterans
- ☐ Social Services
- ☐ Transportation
- ☐ Womens issues

Continue ▶

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.

- ☐ National
- ☐ International
- ☐ Region 1
- ☐ Region 2
- ☐ Region 3
- ☐ Region 4
- ☐ Region 5
- ☐ Region 6
- ☐ Region 7

Enter the regions or areas to which/in which you provide services. If you serve the entire state, it is better to select all the regions instead of just the state. Many donors are looking for charities that serve clients in the area in which they work or live.

Continue ▶

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 Percent]

Please 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.

Please Print your application before saving. If editing is needed se[e]

Print 💾

You may print your application and save it on your PC.

To edit, please save and re-enter on start page as returning charities using your PIN and CVC Code sent to your contact email.

Save and Submit

Note: If you need to make changes, return to the beginning of the application and enter the portal through Returning Charities, make your changes, continue until you get to the above screen a second time, then you may click on Save to Submit.

If no changes are needed – click on Save and Submit.

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.

Congratulations

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 I990 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