

Commonwealth of Virginia Campaign (CVC) Charity Application Guide for RETURNING* 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 Returning charity (You were in the campaign last year, *or* if you were part of a federation and you are now independent/unaffiliated *or* you changed federations, you are a **RETURNING CHARITY**. (NEW charities are covered in a separate user guide)

1. Click on the Green Box that says “Returning Charities.” You will get a screen with the following information.

Welcome New Charities

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

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**.

Click on the Returning Charities Box to get started.

Welcome to the 2017 CVC Campaign

Request New PIN

For Returning Charities Only

If you currently have a CVC Code from a previous year and want a PIN for this year please submit your CVC Code:

CVC Code: -

Submit

Directions continue on the next page.

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USER GUIDE REVISED April 11, 2017 Applications due by midnight May 5, 2017.

Questions? Write CVCStaff@dhrm.virginia.gov and state the section you were in and what happened when you received an error message or had a question.

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You should use the same CVC code you used previously. You may look up your CVC code for last year at www.cvc.virginia.gov and click on For Donors and Find a Charity.

*Returning charities includes charities that have been in the campaign at least one year in the past two years or for those who entered their application for the current year and need to “return” to the application to make changes.

If you already have your PIN code, scroll to the next box on your screen and turn to the next page in the USER guide.

The screenshot shows a form titled "Request New PIN" with a sub-header "For Returning Charities Only". Below this, it says "If you currently have a CVC Code from a previous year and want a PIN for this year please submit your CVC Code:". There is a text input field for "CVC Code:" followed by a hyphen and another empty input field. A green "Submit" button is at the bottom, with a green arrow pointing to it.

You may notice a change in the CVC Code structure this year. If you are an independent charity and **not** in a federation, enter “00” in the prefix box. Enter your CVC code number in the next box (should be three or more digits – do not add extra zeroes).

If you are independent/unaffiliated, PLEASE continue by selecting the Green Submit button above. You will get a screen labeled Request New PIN number. Note: If you belong to a federation, 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 the federation asks you to enter your own application, request their Federation PIN from them.

Request New PIN Number

The screenshot shows a form titled "Request New PIN Number" with a sub-header "Main Charity Information". It contains several fields: "Name of Federation:" with a dropdown menu showing "Independent/Unaffiliated Charities"; "Name of Organization:" with a text input field containing "Virginia State Employee Assistance Fund"; "CVC Code:" with a dropdown menu showing "0" and a text input field containing "3040"; "First Name:" with a text input field containing "Anne"; "Last Name:" with a text input field containing "Dinterman"; and "Email Address:" with a text input field containing "CVCStaff@dhrm.virginia.gov". At the bottom, there is a green "Request PIN" button with a green arrow pointing to it.

Verify the information that is prefilled in the box outlined in red at left. You may not change your CVC code.

Enter the first and last name of the person at your charity that will be the primary person to receive time-sensitive email from CVC. This request for a PIN will go to the email you enter here. We recommend an “evergreen” email such as info@mycharity.org to ensure someone at your charity will be able to open the emails.

Click on the Request PIN button and it will be sent to the email you entered above in less than one minute.

Go to next page in this user guide.

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Edit Application

For Returning Charities Only

If you currently have a PIN for this year and want to **EDIT** an application. Please enter CVC Code below and have your PIN ready

CVC Code: -

Edit

If you already have your PIN code and want to edit your recently entered application, enter the CVC Code (don't forget the prefix) and select EDIT. Have your PIN code ready. It should look something like this: **24Xeq533IXnGL5**

Tip: Copy the new pin from the screen and paste it into WORD or another document so you can paste it where needed later.



Welcome to the 2017 CVC Campaign

Welcome Returning Charities

In order to complete this application, you will need your **CVC CODE** and **PIN Number**, 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.

As a **returning** charity, you will receive a new PIN number in February via email. If you do not receive one by February 28th, then you can request a new PIN to be emailed to you using the search below. PIN codes change each year. Returning charities have an EBA (Electronic Business Agreement) on file with us. If your CEO has changed, please download the form below and send it to the address on the form via **U.S. Mail**. Beginning in 2010, **ALL** charities will be required to file a new EBA every ten years, 2010, 2020, etc.

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.

Download [EBA \(Electronic Business Agreement\)](#)

If you need to find your CVC Code you can find it in the [Directory of Charities](#)

You will receive a new screen and we will look at it in sections. In this first section (above) read the directions and complete the tasks

Federation Use

CVC Code:

Choose Federation:

Federation PIN Number:

Submit

In this example, we are not using Federation Data, so skip to the next block.

If you are a federation or part of one, get the 2 digit prefix that goes with the CVC Code.

Independent/Unaffiliated Use

CVC Code: 00 3040

Choose Federation: Independent/Unaffiliated Charities

PIN Number:

Submit

The first part of this screen should be prefilled. If it is incorrect, go back to the Returning Charities portal (see first page) and select correct information.

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Request New PIN

For Returning Charities Only
If you currently have a CVC Code from a previous year and want a PIN for this year please submit your CVC Code:

CVC Code: -

After entering your federation code (2 digits) and your CVC code (5 digits), Click on Submi

OR

Edit Application

For Returning Charities Only
If you currently have a PIN for this year and want to EDIT an application. Please enter CVC Code below and have your PIN ready

CVC Code: -

If you have already added your application and want to review, edit, or change info, use this box.

Main Charity Information

Name of Federation:

Name of Organization:

CVC Code:
 -

First Name:

Last Name:

Email Address:

Your PIN will be emailed to the contact person listed above. If the contact email needs to be changed, please email CVCstaff@dhrm.virginia.gov before requesting PIN.

Most of this information will be prefilled. Pay attention to the Email Address – you want to be able to access this email box to receive important notices and to request a PIN.

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.

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fZ4Jr61zzVl

This is the PIN number sent to the email you specified in the earlier screen.

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

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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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 requirements for an applicant to receive services. What determines the amount of aid provided? If charges are made for services rendered, how are levels what cases are the charges waived if any? NOTE: Please only enter plain text. Please remove any formatting (BOLD, Underline, Italics), special character

Charity Statements

Eligibility: 25 words or less

Mission Statement:

Continue

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

Enter your best 25 words here as this is what most potential donors and clients will read about you. If more than 25 words, it will not pass the edits.

We recommend you work on your Mission Statement in WORD so you can spell check and edit it until it is perfect. You may use \$, %, #, and /, and most special characters in this new version. Once you are satisfied with your words, copy it from WORD and paste it into the box represented here with a blue border.

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

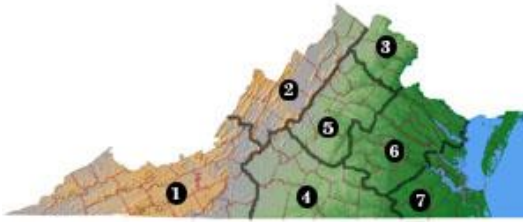
These service areas are used by clients or donors who want to find charities that provide up to four of their services needed and in clicking on search screens, it will provide a list of all charities that fit those qualities. You may select 1, 2, 3, or 4. You only have to match one service to be selected 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. Note: The list at left appears as one column on the screen and is displayed here in 2 to save space.

When you click on Continue it will take you to the next screen (go to next page in this guide).

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Charity Regions

- Statewide
- 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.

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:
Tax Form:

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.

Management Expense:
Fund Raising Cost:
Total Revenue:

Please calculate even if all zero's

Expense Percentage:

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.

As a NEW charity – this is the most important section for special attention to accuracy. 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. Source: I990 or I990EZ

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. Do not attempt to enter a percentage in the 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.

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After Clicking on Final Review, you will receive

Please Print your application before saving. If editing is needed see below.

Print 

You may **Print** your application by clicking on this box.

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 

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

If you need to make changes anytime during the application period, 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 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

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DEFINITION OF TERMS AND WEB LINKS

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 1990 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 1990 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.

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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