



2012 APPLICATION INSTRUCTIONS

Application deadline is **Friday, March 2, 2012**. Both mailed and online forms and attachments (including Excel file for federations) must be submitted prior to 5 p.m. on this date. All mailed applications must bear a postmark prior to - or the actual deadline of - March 2, 2012. Hand delivered applications, at our address below, are accepted between the hours of 9:00 a.m. & 4:00 p.m., Monday through Friday.

The campaign will decline applications that are NOT COMPLETE by the due date of March 2. Before submitting your application, please check to make sure all information is accurate and all attachments are included. No exceptions will be allowed.

Note:

If you wish to consult with SECC staff regarding your application's completeness, you must formally submit your application and contact them with your request for an early review prior to February 15th.

Contact Information:

State Employees Combined Campaign
875 Walnut Street, Suite 150-A
Cary, NC 27511

Telephone: 919-821-2886
Website: www.ncsecc.org

Application Submission

- Faxed or scanned/emailed applications will NOT be accepted.
- Application information and materials for downloading are posted on the SECC website at <http://www.ncsecc.org/2012Application>
- The burden of demonstrating eligibility rests with the applicant.

Notification

The Statewide Campaign Office will assess applications for compliance and completeness before making recommendations for approval or decline to the SECC Advisory Board. The Campaign Office will notify all applicants by May 1st of their campaign status.

REQUIRED: ONLINE FORM OR EXCEL SPREADSHEET

As part of the 2012 application, an online form is available on the SECC website at www.ncsecc.org/2012Application to gather the information that the SECC will include in its 2012 charities database. (Last year, this was submitted as an Excel Spreadsheet on a CD.) This information will be used to provide information in the 2012 Resource Guide and on the SECC website. If you have any questions about the online submission form, call the SECC office at 919-821-2886.

Federations may use the Excel Spreadsheet template on the SECC website to provide the required information for each member charity applying this year. PLEASE NOTE: The spreadsheet template is in the format that is required for merging the charity's data into the SECC database. Federations must include data for each charity participating within their federation. **Please Do Not Modify** the format of this spreadsheet. Any application submitted without an emailed or online submitted spreadsheet will be considered **incomplete and will be declined**.

INSTRUCTIONS FOR COMPLETION

- Charities may apply for admission as an Independent Charity, a Federation or a Member Organization of a Federation. Charities may not apply as both a Federation and as an Independent Charity, or as a Member of a Federation and as an Independent Charity.
- All charities must complete Part A of the 2012 application to be considered for admission.
- Independent charities are required to submit a completed application (hard copy), all attachments and the online form, regardless of whether a new or re-applicant charity. All information from Part A of the application must be included. If information is omitted, the application will be considered incomplete and declined for inclusion in the campaign.
- Re-applicants are those applying for admission to the 2012 campaign that were approved to participate in the 2011 campaign. All charities that did not participate in the 2011 campaign are considered a new applicant and must submit a complete application. This also applies to charities that may have participated in a year prior to 2011.

INSTRUCTIONS FOR FEDERATIONS ONLY

All federations applying for admission to the 2012 campaign must submit an application for the federation itself, and collect/submit appropriate application information and documentation from member charities that are applying as a member of the federation. NOTE: a completed and signed *Certification of Compliance [Part C and Part D]* is required annually for each member charity even if the charity participated previously as a federation member.

Federations must submit to the SECC office a completed application (hard copy) and all attachments for NEW charities. All paper documentation for re-applicants (including all attachments) must be kept at the federation office and open for review. All information from Part A of the applications must be included on the SECC spreadsheet template for all charities applying as a member of the federation. If information is omitted from the spreadsheet, the application will be considered incomplete and declined for inclusion in the campaign. The spreadsheet can be uploaded through the online submission form, or emailed separately to evanbenz@ncsecc.org.

It shall be the responsibility of each federation to certify that all member charities applying for admission are in compliance with the campaign's regulations. The SECC Advisory Committee reserves the right to request information at any time from a federation that documents a member charities compliance with campaign regulations. Such information shall be provided within 10 days of the notification postmark date. The SECC Advisory Committee may deny eligibility of a member charity if the parent federation fails to provide the requested information within the stated 10-day period.

PART A APPLICANT INFORMATION

Legal Name of Organization

The name of the applicant charity as it is listed with the North Carolina Department of the Secretary of State.

Other Name [DBA or Program Name]

Some organizations are considered DBA [Doing Business As], which typically means that the organization is operating under a name other than the legal name. If applying as a program within an organization, please give us the program name. *Please note that we will use the DBA name in the 2012 Resource Guide and on the SECC website. If there is no DBA name, then the organization's Legal Name will be used.*

Mailing Address

List the mailing address where communications from the SECC will be sent.

Name/Title of Organization CEO

Provide the name of the organization's Chief Executive Officer or Chief Professional Officer.

Name/Title of Organization Contact

Provide a name and telephone number for the Primary Contact Person for communication about the SECC. All official campaign correspondence will be sent to the identified Primary Contact.

Website

List the complete Internet address to be used in all 2012 Campaign materials. If your organization does not have a website, please put N/A in this space.

Tax ID Number

Please provide the Employer Identification Number [EIN] from the Internal Revenue Service.

FRA

The FRA is the total support and revenue (restricted AND unrestricted) that an organization allocates to fundraising and administrative expenses. **You must use your most current document to calculate your FRA.** Please disclose whether you are using your Form 990 (990-EZ is not an option) or your audit to calculate your FRA and complete this section with figures from those documents. If using your audit, please also highlight the figures within that document.

Description of Services

Please provide a brief 25-word description of the organization's programs and services. This description cannot exceed 25 words to assure placement in our 2012 Campaign materials (*please use spell-check*)

Category of Services

If completing the Excel template, please mark "X" in the appropriate cell that identifies services provided. This information will be used to help guide state employees and retirees who may be seeking program information.

Area of Services

If completing the Excel template, please mark "X" in the appropriate cell that identifies services provided. If the organization is neither statewide, national nor international, please select the specific NC counties in which services are offered.

PART B ATTACHMENTS

Attachment A CPA Audit or Review

Campaign regulations require the submission of the **most recent** audited financial statement for all organizations with total support and revenue of \$300,000 or greater. A CPA review is permissible for organizations with revenue less than \$300,000. "Most recent" means the most recent fiscal year for which an audit or review of financial information was prepared. The most recent fiscal year must occur in a 3-year period from 2009-2011. The SECC Advisory Committee may grant an exception to the requirement for an audit or review if your organization filed Articles of Incorporation with the NC Department of the Secretary of State after March 1, 2011. **The Form 990 and the CPA Audit/Review DO NOT need to cover the same fiscal years as long as the most current document is provided for each.**

Attachment B Explanation of Excessive FRA

The SECC Advisory Committee may decline organizations reporting an FRA in excess of 25% unless the organization demonstrates that its actual expenses are reasonable and outlines steps to reduce the FRA in the next fiscal year. If your organization's FRA exceeds 25%, please provide information that explains this condition and why you believe it is reasonable. You must also provide information to explain in detail how your organization plans to reduce the FRA in the next fiscal year.

Attachment C IRS Form 990

Your application must include your **most current** IRS Form 990 signed by an authorized agent or officer from your organization. A CPA or accountant's signature will not satisfy this requirement. If your organization is not required by the IRS to submit a Form 990, you must still complete pages 1 and 2 of the form with the notation "*For SECC Purposes Only*" at the top of the first page. **The Form 990 and the CPA Audit/Review DO NOT need to cover the same fiscal years as long as the most current document is provided for each.**

Attachment D NC Solicitation License

A copy of your current NC solicitation license issued by the NC Department of the Secretary of State is required. Solicitation licenses must be valid on or after February 15, 2012 (this includes both renewed and extended licenses). An application for a solicitation license in lieu of the actual license will not be accepted. Some non-profit organizations are exempt from licensure under General Statute 131F-3(3). If your organization is exempt, please provide a letter from the NC Department of the Secretary of State that documents your exemption.

If you do not have a current license or need information regarding the status of your license, contact the NC Department of the Secretary of State at the number shown on the Contact List or visit <http://www.secstate.state.nc.us>. If your organization has been approved for licensure but you have not yet received the license, please send a copy of your approval as shown on the website for the NC Department of the Secretary of State as proof of licensure.

Attachment E For Federations Only - List of Member Organizations

Please submit a list of your member organizations applying for admission to the 2012 campaign.

Attachment F Email Confirmation of submitted online form or CD with Excel Spreadsheet

Please visit our website for the form to submit. Federations may choose to upload or email their spreadsheet. We will provide you a template in the format that we require (do not alter the columns or formatting!) for entering your organization's data into our database. The online form contains all information needed from Part A. The information you provide will generate information that we will use in listing your federation or agency in 2012 Campaign materials and on the SECC website.

Attachment G Letter from Board of Directors

A letter from the board of directors, signed by a voting member, requesting inclusion in the campaign and certifying compliance with the SECC eligibility standards. The letter must be on organization letterhead.

PART C CERTIFICATION OF COMPLIANCE

The State Employees Combined Campaign requires that all organizations applying for admission certify compliance with the requirements as outlined within the 2012 SECC application.

PART D SIGNATURE

Please date and sign your application. The signatory must be an authorized agent of the organization.

Please submit your completed application package including all required attachments and certifications to:

2012 Application
State Employees Combined Campaign
875 Walnut Street, Suite 150-A
Cary, North Carolina 27511

**The deadline for receipt of applications is Friday, March 2, 2012.
Applications received by mail must be postmarked by Monday, March 2, 2011.**

We are glad to answer any questions you have regarding the application procedures. Please refer questions to:

Mary Paisley, SECC Director
Laura Baker, Resource Development Director
Evan Benz, Resource Development Associate
919-821-2886

*Thank you for your interest in the State Employees Combined Campaign.
We look forward to receiving your application for admission to the 2012
campaign, and we are pleased to offer our support and resources.*

Together We Make the Difference