

# COMBINED FEDERAL CAMPAIGN

## 2023 Application for Federations

### 2023 Federation Application

FEDERATION NAME, CFC #00000

#### Step 1: Federation Contact Information

\* Denotes required field

#### Who You Are

Contact Person \*

Contact Title \*

Email Address(es) \* Use semicolons to separate multiple addresses

OPM will send the eligibility decision and other CFC communications to the email address(es) on file. At least one email address is required, however, applicants are highly encouraged to provide more than one email address.

#### Contact Address

P.O. Box Accepted.

Address 1 \*

Address 2

City \*

Greenville

State \*

Zip \*

Phone Number \*

## Optional Information

Organization's Website Address (Do not include "http://" in your website address.)

Fax Number

### Step 2: Application Type

Chosen federation type.

**Local Federation**

I certify that the federation named in this application has

**member organizations**

that individually meet the eligibility criteria for local organizations in 5 CFR § 950.202 and §950.203.

**National Federation**

I certify that the federation named in this application has

**member organizations**

that individually meet the eligibility criteria for national/international organizations in 5 CFR §950.202 and §950.203.

**International Federation**

I certify that the federation named in this application has

**member organizations**

that individually meet the eligibility criteria for international organizations in 5 CFR § 950.202 and §950.203 by providing real services, benefits, assistance, or program activities in at least one foreign country over the previous three years.

### Step 3 -Verification of 501(c)(3) Tax-Exempt Status

We could not find your EIN in the IRS Master File. You are required to upload IRS determination letter. The system can and does verify federation tax-exemption status like how it's does for members and independents. Letter isn't required unless the EIN was not found on BMF.

**YES!**

I certify that the Internal Revenue Service (IRS) recognizes the federation named in this application as tax exempt under 26 U.S.C. 501(c)(3) to which contributions are tax deductible pursuant to 26 U.S.C. 170(c)(2).

# Listing Name Test Federation

**DBA Name:**

**IRS Name:** Test Federation

## Step 4: Human Health & Welfare Certification

**YES!**

I certify that the federation named in this application is a human health and welfare federation and either it or its member organizations provide services, benefits, or assistance to, or conduct activities affecting, human health and welfare. Services, benefits, assistance, or program activities affecting human health and welfare were provided in calendar year 2021.

## Step 5: Financial Statements

Select the appropriate option.

**Option 1**

I certify that the federation named in the application accounts for its funds on an accrual basis in accordance with generally accepted accounting principles (GAAP) and has an audit of its fiscal operations completed annually by an independent certified public accountant in accordance with generally accepted auditing standards (GAAS).

### REQUIRED DOCUMENT Audited Financial Statements

A copy of the auditor's report and the complete audited financial statements for a fiscal period ending not more than 18 months prior to January 2022 which verifies that the federation is honoring designations made to each member organization by distributing a proportionate share of receipts based on donor designations to each member.

Audited Financial Statements Uploaded

**Fiscal period end date:**

**Option 2**

I certify that the federation named in this application accounts for its funds on an accrual basis in accordance with generally accepted accounting principles (GAAP), but has been operating for less than two years from the date of the IRS tax exemption letter to the closing date of the CFC application period and therefore is not required to submit audited financial statements. The organization's IRS Determination or Affirmation Letter must be submitted.

## Step 6: IRS Form 990 or Pro Forma IRS Form 990

Please open files in Adobe Reader to use as a fillable PDF

Download 2020 Form 990 or Pro Forma 990 ([https://s3.amazonaws.com/tasc-charity-application-files/production/pdfs/2020\\_IRS\\_Form\\_990.pdf](https://s3.amazonaws.com/tasc-charity-application-files/production/pdfs/2020_IRS_Form_990.pdf))

Download 2019 Form 990 or Pro Forma 990 ([https://s3.amazonaws.com/tasc-charity-application-files/production/pdfs/2019\\_IRS\\_Form\\_990.pdf](https://s3.amazonaws.com/tasc-charity-application-files/production/pdfs/2019_IRS_Form_990.pdf))

Selected option with IRS Form 990 or Pro Form IRS Form 990.

## Option 1

I certify that the federation named in this application prepares and submits to the IRS a complete copy of the federation's IRS Form 990.

A copy of the complete IRS Form 990 for a period ending not more than 18 months prior to January 2022, including signatures in the box marked "Signature of Officer" or in either IRS Form 8879-EO or IRS Form 8453EO. The preparer's signature alone is not sufficient. IRS Forms 990EZ, 990PF, and comparable forms are not acceptable substitutes.

IRS Form 990 Uploads

### Please enter details for the submitted IRS Form 990

Fiscal period start

date: 10/21/2020

Fiscal period end

date: 10/21/2021

### Accounting Method Used:

Is the uploaded tax return signed and dated by an Officer at the Organization?

- Yes  
 No

The IRS Form must be signed and dated by an officer at the organization. The document can be electronically signed on this step of the CFC application.

**YES!**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

An officer who is authorized to sign the organization's tax document may be the organization's president, vice president, treasurer, assistant treasurer, chief accounting officer or other corporate or association officer, such as a tax officer.

**Please note:** The tax preparer's signature will not be accepted in lieu of a signature from an officer at the organization.

Full Name

Title

Initials

## Option 2

I certify that the federation named in this application is not required to prepare and submit an IRS Form 990 to the IRS.

A pro forma IRS Form 990 for a period ending not more than 18 months prior to January 2022. See application instructions for pro forma IRS Form 990 requirements. IRS Forms 990 EZ, 990PF, and comparable forms are not acceptable substitutes.

Step 7: Administrative and Fundraising Rate (AFR)

Fill in the required fields with information from the IRS Form 990 or pro forma IRS Form 990 and confirm the rate.

**NOTE: When entering the organization's total revenue (Part VIII, Line 12), General and Management Expenses (Part IX, Line 25, Column C), and Fundraising expenses (Part IX, Line 25, Column D), round up to the nearest dollar. The system does not accept decimals.**

<input type="text"/>	<b>Management &amp; General Expenses</b> <input type="checkbox"/>
<input type="text"/>	<b>Fundraising Expenses</b> <input type="checkbox"/>
<input type="text"/>	<b>Total Revenue</b> <input type="checkbox"/>

**Your AFR is: %**

AFR = total expenses divided by total revenue X 100

Confirm your organization's AFR and select "YES!" to certify the statement below.

**YES!**

I certify that this is the administrative and fundraising rate (AFR) for the federation named in this application. This percentage is computed only from information on the IRS Form 990 or pro forma IRS Form 990 submitted with this application.

Step 8: Governing Body

**YES!**

I certify that an active and responsible governing body, whose members have no material conflict of interest and a majority of whom serves without compensation, directs the federation named in this application.

For the majority of the board to be considered uncompensated, less than 50% of the people marked as either Institutional trustee or Individual trustee or director in column C of Part VII may have any compensation showing in columns D, E or F. If 50% or more have any compensation in those columns, the majority of the board is not considered uncompensated.

If the organization is required to submit an IRS Form 990 to the IRS, the organization may need to make the corrections in the document and then amend it with the IRS before submission with the CFC application. A previously filed tax return that was edited but not amended with the IRS will not be accepted.

List of Board of Directors and Meeting Dates Required

A complete list of the federation's board of directors with the beginning and end date of each board member's current term of office and the board's meeting dates and locations for calendar year 2021.

List of Board of Directors and Meeting Dates Uploaded

Step 9 Verification Statements

Select "YES!" to certify to the statements below.

**YES!**

I certify that the federation named in this application prohibits the sale or lease of CFC contributor lists.

**YES!**

I certify that the federation named in this application conducts publicity and promotional activities based upon its actual program and operations, and that these activities are truthful and non-deceptive, include all material facts, and make no exaggerated or misleading claims.

**YES!**

I certify that the federation named in this application effectively uses the funds contributed for its announced purposes.

**YES!**

I certify that the federation named in this application does not employ, in its CFC operations, the services of private consultants, consulting firms, advertising agencies or similar business organizations to perform its policy-making or decision-making functions in the CFC.

**YES!**

I certify that the federation named in this application is in compliance with all statutes, Executive orders, and regulations restricting or prohibiting U.S. persons from engaging in transactions and dealings with countries, entities, or individuals subject to economic sanctions administered by the U.S. Department of the Treasury's Office of Foreign Assets Control. The organization named in this application is aware that a list of countries subject to such sanctions, a list of Specially Designated Nationals and Blocked Persons subject to such sanctions, and overviews and guidelines for each such sanctions program can be found at <http://www.treas.gov/ofac>. Should any change in circumstances pertaining to this certification occur at any time, the organization will immediately notify OPM's Office of CFC.