

## RECOMMENDATIONS FOR COMPLETING THE 2013 CFC APPLICATION

**CFC Application with Certifications:** This must be a paper document with original signatures. Failure to mark a box for each of the 13 certifications will result in the denial of the application. The completed application form must be submitted as hard copy.

**Attachment A:** An organization must demonstrate its public benefit and overall human health and welfare impact (certifications 1 & 4). A description of services, activities, programs, impacts and those who benefited during 2012 will fulfill this requirement. Below is chart addressing programmatic impacts that are recommended for Attachment A:

Description of Programs, Services & Activities	Location of Programs, Services & Activities	What were the impacts of your Programs, Services & Activities	Who benefited from your Programs, Services & Activities (children & families, students, elders, individuals with challenges, etc.)	How many benefitted from your Programs, Services & Activities

**Attachment B:** IRS 501(c) (3) letter. Your letter should have been issued or updated within the past 5 years. If the name of the organization differs on the IRS determination letter, the IRS Form 990, or audited financial statements, you must:

Submit DBA or trade name documentation from the IRS or state government confirming this name change.

**Attachment C:** Audited Financial Statements for a fiscal year ending on or after June 30, 2011, for organizations with revenues over \$100,000. The audit must be for the same fiscal period as the 990.

**Attachment D:** IRS Form 990 for a fiscal year ending on or after June 30, 2011. The Form 990 and audited financial statements must cover the same fiscal period. **PLEASE NOTE:**

1. Form 990 MUST include the "Signature of an officer." If you are sending a PDF, make sure the 990 is signed. If it is not, you may attach the signature page in a separate file or send it as a fax.
2. Applicants who filed the Form 990 electronically will need to submit a copy of an officer-signed Form 8879- EO or Form 8453-EO in lieu of an officer's signature on the Form 990.
3. Form 990 must be complete, including all supplemental statements and Schedule A (Schedule B is not required).
4. Check the number of voting members listed on page 1, line 3, and the number of individuals listed in Part VII on page 7 of your Form 990. The figure on page 1 generally must match the number of individuals identified as an Individual Trustee or Director or as

- an Institutional Trustee in Column C of Part VII.
5. If you filed a Form 990-EZ or were not required by the IRS to file a 990, you must provide a "Pro Forma 990."

## **PRO FORMA 990**

Organizations applying to the Combined Federal Campaign must submit a copy of their most recent tax return. In most cases, this is the IRS Form 990.

If the IRS permitted your organization to submit a Form 990 EZ, you must provide a full copy of that document. In addition, the applicant must complete a "Pro Forma 990," you will need the Pro Forma to calculate your administrative and fundraising rate.

If the IRS did not require that the organization submit any tax return (revenue below \$50,000), the applicant must still submit the Pro Forma 990.

The Pro Forma includes certain pages of the Form 990, as described below:

### **PRO FORMA 990 PAGES (2010, 2011, or 2012 IRS Form 990)**

The Pro-Forma 990 consists of the following pages of the IRS Form 990 (long form):

- Page 1, including Signature Block (Part I & II)
- Pages 7 through 10 (Part VII A, VIII & IX)
- Page 12 (Part XII)

The Pro Forma Templates can be found on our website: [www.cfcnocal.com/charity\\_info.html](http://www.cfcnocal.com/charity_info.html)

**Attachment E:** A 25-word statement that best describes your organization. This statement will be listed in the 2013 CFC Norcal brochure.