

**ENCLOSURE SEPARATOR #1**

**Organizational Description**

Enclosure #1 should include:

A description of up to 25 words.

1	2	3	4	5
6	7	8	9	10
11	12	13	14	15
16	17	18	19	20
21	22	23	24	25

Percentage of administrative and fundraising expenses.

Percentage of administrative and fundraising expenses: this percentage shall be computed from information on the IRS Form 990 by adding the amount spent on "management and general" (Part IX) to "Fundraising expenses" (Part IX) and dividing the sum by Part VIII (Statement of Revenue), "Total Revenue." If this percentage exceeds 30.00% - STOP - your organization does not meet the criteria and does not qualify for participation.

Telephone number.

Federations must provide the above for each agency they represent which will be included in the ASECCC.

## ENCLOSURE SEPARATOR #2

### **Substantial Local or Statewide Presence**

Include:

- List of programs or services offered.
- Address and phone number(s) of your organization's offices in this area or statewide.
- Hours your offices are open.
- Number of paid staff and/or volunteers who actually provide services from the local (statewide) office.

In applying for statewide participation, please provide evidence that services of direct benefit to individuals are available to state employees statewide.

Representative samples of people directly benefiting from your service would be solid evidence.

**(If applying for both statewide and local presence, separate applications are required.)**

## ENCLOSURE SEPARATOR #3

### **Tax-exempt Status**

Include:

- Proof your organization has been granted tax-exempt status under the Internal Revenue Service Code, Section 501(c)(3).

## ENCLOSURE SEPARATOR #4

### **Legally Incorporated**

Include:

- Proof your organization is legally incorporated or authorized to do business in the state of Alabama as a private, nonprofit organization.

If your organization has undergone a name change, include copy of documentation sent to the local Probate Office, Attorney General or Secretary of State regarding the name change.

## ENCLOSURE SEPARATOR #5

# **Alabama Fund Raising**

- Provide data demonstrating that at least 60% of the funds your organization raised locally (statewide) in **each of the two fiscal (2016 & 2017) years prior** to this application came from individual contributions from within Alabama. This does not include government contracts, grants, or any funding which are applied for.

This information can be presented in various ways.

Please make sure you provide the information as clearly and as accurately as possible.

Please demonstrate to the Steering Committee or Local Agency Review Committee that 60% of the funds you raise (this does not include grants or federal payments) come from Alabama sources.

One of the two amounts presented should tie back to the IRS Form 990 (Statement of Revenue) and Audit (if applicable) being submitted.

## ENCLOSURE SEPARATOR #6

### **Nondiscrimination**

Include:

- ☑ A copy of the written policy regarding non-discrimination adopted by your Board of Directors. This may include excerpts from policies and procedures, minutes, by-laws, etc. The policy must comply with all requirements of laws and regulations respecting nondiscrimination and equal employment opportunity with respect to clients, officers, employees and volunteers.

(Please note that a signed statement from a Board Official or Director of the program *is not* sufficient and cannot be accepted in lieu of your written policy.)

## ENCLOSURE SEPARATOR #7

### **Active Local Board**

Organizations must be directed by an active local board, which meets at least quarterly, whose members serve without compensation (for organizations where a paid executive director or other staff member is a member, volunteers must constitute the majority of the board), and whose members are residents of the local geographic region served. *(Organizations serving the needy overseas are exempt from the local geographic region served.)*

Include:

- Names and addresses of Board of Directors.  
(Board members must be from area applying to.)
  
- Schedule of 2018 Board meetings.  
(Board must meet no fewer than **four** times a year.)

## ENCLOSURE SEPARATOR #8

### **Proper Financial Procedures**

Include:

- 2018 annual budget
  
- Most recent annual report (2017 or 2018) or most recent newsletters (minimum of 4 per year)
  
- Most recent independent audit (must be within 18 months of application) (organizations with total revenue less than \$250K are exempt from submitting an audit but should submit an internal review)
  
- Most recent IRS Form 990 (must be within 18 months of application)

(IRS Form 990EZ is not acceptable – a pro forma 990 must be completed to be considered for participation).



**ENCLOSURE SEPARATOR #9**

**Local Fundraising**

**(For **FEDERATIONS ONLY** with the exception of federations serving the needy overseas meeting local requirement)**

Include:

- Provide documentation that your federation has raised at least \$60,000 at the local level, distributed that sum among at least ten (10) charitable agencies, in each of its last two fiscal years preceding this application.