

INSTRUCTIONS FOR COMPLETION

You may apply for admission as a Federation and/or as a Member Agency of a Federation. Please indicate which category applies to your organization.

Tell us if you are a first-time applicant or if you are reapplying. Re-applicants are those applying for admission to the 2008 campaign and who were approved to participate in the 2007 campaign. All other applicants are considered new even if approved to participate in campaign years prior to 2007.

PART A APPLICANT INFORMATION

Legal Name of Organization

The name of the applicant charity as it is listed with the Oklahoma Secretary of State.

Other Name [DBA]

Some organizations are considered DBA [Doing Business As], which typically means that the organization is operating under a name other than the legal name.

Mailing Address

List the mailing address where you want to receive communications from the SCC. This will also be the mailing address used to send your organization's designations.

Name/Title of Organization CEO

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

Name/Title of Organization Contact

Provide a name and telephone number for the Primary Contact Person for your organization. You may designate a Primary Contact for communication about your application with the SCC. Please include the fax number and e-mail address for the Primary Contact.

Website

List the complete Internet address for your organization.

Tax ID Number

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

Description of Services

We need a brief description of your organization's programs and services. Your description cannot exceed 25 words to assure placement in our 2008 Resource Guide. Please include your telephone number and website, which we will include with your description and organization code number, so that contributors can identify you in the Resource Guide.

FRA

The FRA is the total support and revenue that your organization allocates to fundraising and administrative expenses. We have provided a formula helping you determine your organization's FRA as part of the application.

FRA Year

Please provide the fiscal year of the IRS Form 990 that you used in computing your FRA.



Public Solicitations

The Public Solicitations calculations show the total government support and public support that your organization receives. We have provided formulas to help you determine each.

Public Solicitations Year

Please provide the fiscal year of the IRS Form 990 that you used in computing your Public Solicitations calculations.

Category of Services

Check the appropriate box(es) to tell us the nature of services your organization provides. We will use this information to guide state employees who are seeking program information. If necessary, you can attach an additional page as Attachment A that briefly describes each of your service categories.

Area of Services

Check the appropriate box: Local, Statewide or International. This information will be used to determine which district resource guide(s) in which your federation qualifies to be listed. Unless your organization's scope of service is international, you will need circle the counties in which your organization provides services. If your organization serves all 77 counties in Oklahoma, you only need to check the box for this rather than circle all counties.

PART B Attachments

Attachment A Category of Services Descriptions

This attachment is optional and the submission of it does not determine your organization's eligibility. Please feel free to include an additional page briefly describing each of your organization's service categories. This page helps the Committee to better understand the programs and services that your organization provides to its clients.

Attachment B List of Current Board Members

The list must include current, active board members and must provide board members' home or business address. Please assure that the Board list includes the name and address of the member signing the Board letter referenced in Attachment A.

Attachment C CPA Audit

Our campaign regulations require the submission of the most recent audited financial statement for all organizations with total support and revenue of \$50,000 or greater. A CPA review is permissible for organizations with revenue less than \$50,000. "Most recent" means the most recent fiscal year for which an audit of financial information was prepared.

Attachment D IRS Form 990

Your application must include IRS Form 990 signed by an authorized agent or officer from your organization. A CPA or accountant's signature alone will not satisfy this requirement. We require this form so that you can determine your FRA, Public Solicitations calculations, and reconcile revenue and expenses with the CPA audit. If your organization is not required by the IRS to submit Form 990, you must still complete pages 1 and 2 of the form with the notation "*For SCC Purposes Only*" at the top of the first page. **The Form 990 and the CPA Audit must cover the same fiscal years.**

Please do not submit forms 990-EZ or 990-PF in lieu of the 990; they do not satisfy this requirement.

Attachment E Federal Tax Exempt Letter

Your letter from the Internal Revenue Service must state that your organization is defined as tax exempt under the provisions of 501(c)(3). Please assure that the letter has your organization's current address listed, and has not expired. You may want to visit the IRS's website at <http://www.irs.gov/charities/article/0,,id=178801,00.html> to verify that your organization's tax exempt status is current.



Attachment F Oklahoma Certificate of Registration of a Charitable Organization

We must have a copy of your current Oklahoma certification as a charitable organization issued by the Oklahoma Secretary of State. Charitable Organization Certifications must be current. We will not accept an application for a charitable organization registration in lieu of the actual certification.

If you do not have a current certification or need information regarding the status of your certification, you should contact the Oklahoma Secretary of State at (405) 521-3912. You can download the registration form at <http://www.sos.state.ok.us/forms/fm0101.pdf>. You can check the status of your organization's certification at the SOONERAccess website at <https://www.sooneraccess.state.ok.us/home/home-default.asp>; choose "Entity Search", choose "Search Active", and then type the name of your organization to search. If your organization has been approved as an Oklahoma Charitable Organization but you have not yet received the certification, please send a copy of your approval as shown on the website as proof of registration.

Attachment G Oklahoma Certificate of Incorporation

Organizations incorporated in Oklahoma are considered domestic corporations and must provide a copy of the Certificate of Incorporation issued by the Oklahoma Secretary of State.

Your organization's certification must be current and active. We recommend that you access the Oklahoma Secretary of State's SOONERAccess website at <https://www.sooneraccess.state.ok.us/home/home-default.asp> for proof that your certification is current; choose "Entity Search", choose "Search Active", and then type the name of your organization to search. You can also download the necessary forms at the Oklahoma Secretary of State's website at <http://www.sos.state.ok.us/forms/FORMS.HTM#Oklahoma%20Corp>.

Attachment L List of Member Organizations

This provision applies only to federations. Please submit a list of your member organizations applying for admission to the 2008 campaign.

PART C CERTIFICATION OF COMPLIANCE

The State Charitable Campaign requires that all organizations applying for admission certify compliance with campaign rules and regulations as expressed in the Oklahoma statutes and administrative rules. Please read each requirement for certifying compliance, check the box for each certification your organization meets, and then date and sign at the bottom of Part C. The signatory must be an authorized agent of the organization applying for admission to the 2008 campaign.

PART D LPCFRO CERTIFICATION OF COMPLIANCE

This provision applies only to federations apply to be a 2008 Local Principal Combined Fund Raising Organization (LPCFRO). The federations that are applying to serve as the LPCFRO for their respective district must certify compliance with this requirement for the 2008 campaign by dating and signing at the bottom of Part D. The signatory must be an authorized agent of the organization applying for admission to the 2008 campaign.



ADDITIONAL INFORMATION

Campaign Regulations

You may need to refer to the campaign statutes and administrative rules in completing this application. You may access our campaign regulations at the Oklahoma State Charitable Campaign website at http://www.ok.gov/opm/HR_and_Employee_Services/State_Charitable_Campaign.html. A hard copy is available by mail upon request.

Application Submission

All federations and member agencies must submit a full, completed application and required attachments to show that the organization is in compliance with all the eligibility criteria. We require a hard copy of your completed application, and we do not accept electronic or faxed applications. The application is available online if you need additional copies at http://www.ok.gov/opm/HR_and_Employee_Services/State_Charitable_Campaign.html. The burden of demonstrating eligibility rests with the applicant.

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

State Charitable Campaign
Attn: Jan Ette Oakley
1315 North Broadway Place
Oklahoma City, OK 73103

You may also choose to hand deliver the completed application package to the address noted above during our business hours which are 8:30 am to 5:00 pm Monday through Friday.

**The deadline for receipt of applications is Friday, March 28, 2008.
Applications received by mail must be postmarked by Friday, March 28, 2008.**

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

Jan Ette Oakley, Executive Director
joakley@unitedwayokc.org
(405) 236-8441 x261
(405) 232-0372 FAX

Application Assessment

Certification and rejection of applications will be announced at the OCSECC's regular May meeting scheduled for Wednesday, May 14, at 2:30 p.m. Rejected federations and member agencies may appeal to the OCSECC for reconsideration on the basis of new proof of their eligibility to participate in the campaign. Appeals must be submitted no later than Monday, June 30 at 5:00 p.m. A special meeting will be scheduled for Wednesday, July 2 at 2:30 p.m. for the OCSECC to review appeals and hear public comment. The OCSECC shall notify the appealing federation and agency of its final decision in writing.

Thank you for your interest in the Oklahoma State Charitable Campaign. We look forward to receiving your application for admission to the 2008 campaign, and we are pleased to offer our support and resources.

