IMPORTANT

### DATED INFORMATION ENCLOSED

**2020 UNIVERSITY OF FLORIDA CAMPAIGN FOR CHARITIES**

UFCC APPLICATION DEADLINE:

#### **FEBRUARY 3, 2020**

##### All applications must be submitted online by

**February 3, 2020**

to be considered eligible for inclusion in the campaign.

**ufcc.ufl.edu**

**The interactive application will be available online on December 6, 2019**

ONLY COMPLETED APPLICATIONS WITH ALL REQUIRED DOCUMENTATION WILL BE CONSIDERED.

ALL ORGANIZATIONS MUST APPLY EVERY YEAR TO BE ELIGIBLE TO RECEIVE DONATIONS FROM THE UFCC.

2020 UFCC GOVERNING PROCEDURES can be found at ufcc.ufl.edu

**2020 UNIVERSITY OF FLORIDA CAMPAIGN FOR CHARITIES**

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# **GOVERNING PROCEDURES**

To serve the best interests of the University of Florida and the community, one Gainesville campus multiagency fund-raising drive the UF Campaign for Charities will be open to all university employees employed in Alachua County who wish to participate and will be held annually each fall. Payroll deductions may be utilized in fulfillment of pledges or promised contributions to the UFCC.

A Planning Committee is responsible for the development, implementation, and administration of procedures and standards by which the campaign shall be conducted and shall have the responsibility of amending those procedures and standards.

It is important to note that February 3, 2020, is the deadline for organizations applying for UFCC eligibility. Please note that the deadline for receipt of applications and appeals means that all of the materials required as part of the application or appeal must be uploaded to the UFCC site (ufcc.ufl.edu) no later than the date specified.

APPLICATIONS

Attached is the application form for use in applying for eligibility in the 2020 UFCC. The use of this form is mandatory for all applications for the UFCC. It is suggested that any additional information that may be pertinent to the questions asked be attached as supplementary documentation, if necessary. All questions must be answered and all required supporting documentation included to be considered for eligibility in the UFCC.

Upon request of an organization wishing to participate, the committee will provide a copy of these procedures and an application form. All application materials and proceedings are subject to the Florida Public Records and Sunshine Laws.

The Planning Committee will review all applications by March 2020. Organizations may expect to be notified of the decision of the committee on their applications no later than May 2020. Organizations will have ten days from the receipt of notification to file an appeal.

Each organization selected will be listed only once in donor designation literature.

APPEALS

All organizations that apply for inclusion in the UFCC and are found ineligible, have one and only one appeal to the Planning Committee. In the appeal, the organization may present additional information on its behalf. Appellants should insure that their appeals are complete and responsive to the actual reasons for the original adverse recommendation. The Planning Committee will only consider the specific reasons for denial of an organization’s application. The recommendation of the committee and the President’s decision following this hearing shall be final. All such hearings and final decisions on the applicants will be completed by early June 2020.

REVOCATION OF APPROVAL

The Planning Committee may revoke approval to participate in the campaign at any time in the event that the organization violates a policy or rule of the University of Florida concerning the campaign, or false or misleading information is submitted to the University at the time of application for admission to the campaign or pursuant to any subsequent request by the university.

FISCAL AGENT

The fiscal agent for the UFCC shall be an organization that has the experience, expertise, and resources to conduct and coordinate a local community campaign in Alachua County. The Planning Committee has selected United Way of North Central Florida as the fiscal agent for the 2020 UFCC.

DISBURSEMENT OF FUNDS

The University will forward to the fiscal agent, on a biweekly schedule, a warrant in payment of employee pledges for that period. The fiscal agent will forward the earned funds to each agency minus campaign administrative costs and each agency’s percentage share of the campaign undesignated donations.

Contributions to the UFCC that are not designated to a specific agency are distributed by the campaign based on the percentage of designated funds given to each agency.

If an agency is part of a federation, the federation is given the funds for distribution according to their federation agreements.

2020 UNIVERSITY OF FLORIDA

CAMPAIGN FOR CHARITIES (UFCC)

## APPLICATION FOR PARTICIPATION

* Please complete this application and provide the required documentation in accordance with instructions contained in the 2020 UFCC Governing Procedures.

**Applications should be submitted online at** [**ufcc.ufl.edu**](http://ufcc.ufl.edu) **by February 3, 2020.**

* All organizations must apply every year to be eligible to receive donations from the UFCC. All required documentation must be submitted as requested. Failure to submit documentation will result in denial. Failure to meet all specified criteria will result in denial.

1. Name of Organization:

2. Mailing Address: Zip \_\_\_

3. Agency Telephone Number: Fax Number:

Contact Person: Title:

Telephone Number: E-Mail:

Web Address:

4. Mission of Organization (25 words or less – description to be used in UFCC brochure):

1. 5. In addition to **Alachua County**, which surrounding Florida counties, if any, are served by your organization:

Bradford Gilchrist Putnam

Clay Levy Suwannee

Columbia Marion Union

2020 UNIVERSITY OF FLORIDA CAMPAIGN FOR CHARITIES

CRITERIA AND ELIGIBILITY REQUIREMENTS

To be eligible for inclusion in the 2020 University of Florida Campaign for Charities, the following up-to-date documentation shall be required (out-of-date or expired documents will not be accepted):

6. The organization is registered with the State of Florida Division of Corporations, pursuant to Chapter 617, Florida Statutes.

YES \_\_\_\_\_ NO \_\_\_\_\_ (Documentation required showing **current** **year** filing of Annual Report)

7. The organization is registered with the United States Department of the Treasury and recognized as a 501(c)(3) entity or the equivalent by the United States Internal Revenue Service.

YES \_\_\_\_\_ NO \_\_\_\_\_

Tax Exempt #: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (IRS Tax Exempt Ruling letter required)

If NO, please explain.

8. The organization is registered with the Florida Department of Revenue, Registration and Subjectivity Section, and received a state tax exempt number pursuant to Section 212.08. Florida Statutes (Must renew every 5 years).

YES \_\_\_\_\_ NO \_\_\_\_\_

Tax Exempt #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Documentation required showing **current** registration)

9. The organization is registered with the Florida Department of Agriculture and Consumer Affairs, Division of Consumer Services, in accordance with Chapter 496, Florida Statutes.

YES \_\_\_\_\_ NO \_\_\_\_\_ EXEMPT \_\_\_\_\_

Registration #:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (Documentation required showing **current** registration)

(Organizations claiming exemption from the provisions of Chapter 496, Florida Statutes, must provide documentation supporting the exemption.)

10. The organization must submit a copy of its current fiscal year (i.e., FY 2019-2020) budget.

11. The organization is governed by a volunteer board of directors that meets regularly and serves without compensation. *(Compensation shall not be deemed to include payment of the reasonable expenses of service as a director, including liability insurance. The board of directors must direct policy development and implementation, retain oversight of program delivery, and exercise executive level supervision.)*

YES \_\_\_\_\_ NO \_\_\_\_\_ (Include Roster of Board of Directors; Include Local Board of Directors, if applicable.)

12. The organization has a recognized, ongoing and substantial program of health and human services\* directly benefiting the Alachua County region.

YES \_\_\_\_\_ NO \_\_\_\_\_

The following documentation is required **using attached worksheet**:

* A detailed description of the goals and objectives of the programs provided.
* Documentation of expenditures.
* Quantitative data on the number of people served in the Alachua County Region.

Please attach any other pertinent information. (Agency audit, program brochures, annual report, or other information that describes your agency mission and performance)

*\* A program of health and human services is one whose principal objective is to assist people to improve the conditions that are necessary to achieve fundamental physical, social and/or psychological well-being. Health and human services include research directed toward the achievement of human physical, social and/or psychological well-being and specific helping acts to individuals or groups that go beyond the provision of information.*

13. The organization has a written policy of non-discrimination and carries out an affirmative action program that applies to volunteer governance, staffing, and clientele of the organization (all policies must meet requirements of state and federal law).

YES \_\_\_\_\_ NO \_\_\_\_\_

Provide a copy of the policy.

14. The organization must submit a copy of the organization's **most recent** IRS Form 990 or 990EZ in its entirety - as it was submitted to the IRS.

If the Internal Revenue Service does not require your applicant organization to file an IRS Form 990, OR if you submit an 990EZ to the IRS, you must still complete and submit to campaign officials a signed copy of the 990 with the following pages completed:

* Page 1, (Part I Summary and Part II, Signature Block),
* Page 7,
* Page 8, (Part VII Compensation sections A and B)
* Page 9, (Part VIII Statement of Revenue),
* Page 10 (Part IX Statement of Functional Expenses), and
* Page 11 (Part X Balance Sheet).

**IRS Form 990 must be signed by authorized agency signatory; the preparer’s signature alone is not sufficient.** This document does not have to have been submitted to the IRS but must be prepared per IRS regulations. It is acceptable to note on the IRS 990 that it was prepared “For UFCC Purposes Only”.  Note that Part IX regarding functional expenses must be complete, with all entries ultimately adding to Column A.

**Organizations claiming exemption from this provision of Chapter 496, Fla. Statute., must provide documentation supporting the exemption.**

Has your **most recent** 990 or appropriate information been uploaded with this application? Yes \_\_\_\_\_\_\_\_ No \_\_\_\_\_\_\_\_

15. National Charities Information Bureau (NCIB) and the larger non-profit community have set the following standard for non-profits: An agency should maintain management, general, and fund-raising costs at or below 25 percent of the total budget.

Following is a guide for computing the computations needed for the next question. Please complete computations by entering items from the IRS Form 990 submitted with this application:

Management/Administrative Expenses (Line 25- column (C) Part IX)… ………..$\_\_\_\_\_\_\_\_\_\_\_\_\_

**(plus)  +**

Fund Raising Expenses (Line 25-column (D) Part IX)..….………………..……………...$\_\_\_\_\_\_\_\_\_\_\_\_\_

Total (Line 25 C and Line  25 D)……………………………………..$\_\_\_\_\_\_\_\_\_\_\_\_\_

DIVIDED BY Total Revenue (Line 12, Part I) ………………………………………..………...$\_\_\_\_\_\_\_\_\_\_\_\_\_

EQUALS:

Actual Administrative & Fund Raising Expenses as a percentage of Revenue: \_\_ \_\_. \_\_**%**

15 (a). If the organizations management, general, and fund-raising costs exceed 25% percent of the total budget please set forth with particularity (in the space provided on the application or in an attachment), the facts you allege that constitute “extraordinary circumstances” and which justify your organization’s inclusion in the campaign.  In addition, explain why these extraordinary circumstances could not have been avoided.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

16. Is your organization represented by a federation (i.e., United Way, Community Health Charities of Florida)?

YES \_\_\_\_\_ NO \_\_\_\_\_

All organizations must meet all of the criteria established herein and apply separately. Each organization selected will be listed only once in Donor Designation Literature. Please indicate how your agency is to be listed — Check one:

* United Way of North Central Florida Agency
* Community Health Charities of Florida Agency
* Independent (not affiliated with either federation listed above)

SIGNATURE PAGE

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, am the duly appointed and

Authorized representative of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and

(Name of Organization)

hereby certify the accuracy and completeness of this application.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Typed or Printed Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title

Date Completed\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2020 UNIVERSITY OF FLORIDA CAMPAIGN FOR CHARITIES (UFCC)

APPLICATION FOR PARTICIPATION

CHECKLIST

To be eligible for inclusion in the 2020 University of Florida Campaign for Charities, applications must be complete with all required documentation submitted.

* State of Florida Division of Corporations Registration (Criterion #6).
* IRS Tax Exempt ruling letter (Criterion #7).
* Florida Department of Revenue tax exempt document (Criterion #8).
* Florida Department of Agriculture and Consumer Affairs document showing registration # OR document supporting exemption under Chapter 496, Florida Statutes (Criterion #9).
* IRS Form 990 **OR** IRS Form 990EZ plus pages 9 and 10 of IRS Form 990 (Criterion #10(a)).
* Agency budget for current fiscal year (FY 2019-2020) (Criterion #10(b)).
* Roster of Board of Directors (Criterion #11).
* Documentation of expenditures, programs, and number of people served in Alachua County Region (Criterion #12).
* Detailed description of the goals and objectives of the programs/services provided.
* Documentation reflecting FY expenditures.
* Quantitative data on the number of people served in the Alachua County Region.
* Written policy of non-discrimination and affirmation action (Criterion #13).
* Documentation showing how percentage of management, general, and fundraising costs were derived using formulas provided and all appropriate supporting documentation (Criterion #15).
* One copy of application is complete, signed, and dated and delivered by 5:00 pm on February 3, 2020 (if completing paper copy).