

COORDINATING AGENCY
2009 COMBINED MUNICIPAL CAMPAIGN

REQUEST FOR APPLICATIONS

The Combined Municipal Campaign is the vehicle by which the City provides to its employees an effective, convenient and dependable procedure for making voluntary monetary contributions to qualified not-for-profit charitable organizations.

The City of New York is now preparing for its 2009 **Combined Municipal Campaign**. A critical role in that campaign will be played by the federated community campaign which the City selects to serve as **Coordinating Agency**.

The Coordinating Agency serves as primary coordinator and organizer of the Combined Municipal Campaign. While many agencies may participate, there is only one Coordinating Agency in the campaign. Each year applications are solicited for Coordinating Agency.

Responsibilities of the Coordinating Agency include, but are not limited to:

- (1) reviewing all applications for participation in the Combined Municipal Campaign;
- (2) conducting the annual solicitation campaign in a manner approved by the Commissioner of the Department of Citywide Administrative Services;
- (3) receiving all contributions made by employees to the campaign;
- (4) acting in a fiduciary capacity with respect to the receipt and distribution of funds; and
- (5) providing to the City an annual budget of the campaign as agreed upon by it and the participants in the campaign. Please note that administrative expenses shall be divided equally among all participating agencies (with each constituent member of a federation of charitable, nonprofit organizations to be counted as a separate participating agency). Undesignated funds and interest income shall also be distributed equally among all participating agencies in the same manner.

In order to be considered for the position of Coordinating Agency, a charitable organization must:

- (1) have tax exempt status pursuant to Section 501(c)(3) of the Internal Revenue Code;
- (2) be registered pursuant to Article 7-A of the New York Executive Law;
- (3) be a federated community campaign as defined in Section 93-b of the New York General Municipal Law; and
- (4) agree to execute a document agreeing to administer, manage and coordinate the 2009 Combined Municipal Campaign in a manner approved by the Commissioner of the Department of Citywide Administrative Services including, but not limited to, the following:
 - a. placing all funds collected in connection with the 2009 Combined Municipal Campaign into a separate, segregated interest bearing account in the Amalgamated Savings Bank, New York, New York;
 - b. deducting from the funds collected on behalf of the Combined Municipal Campaign the administrative costs incurred in connection with the annual solicitation campaign. These administrative costs shall be limited to the actual cost of printing, delivering and distributing the brochures and posters and other publicity materials regarding the 2009 Combined Municipal Campaign; the actual cost for items purchased and used in presentations and training sessions, and the actual cost of transportation to and from such presentations and training sessions;
 - c. holding in reserve a portion of the funds collected on behalf of the Combined Municipal Campaign to be used for payment of the costs associated with an official audit of the 2009 Combined Municipal Campaign by a certified public accountant selected by the Commissioner of the Department of Citywide Administrative Services. The amount of such portion shall be determined by the Commissioner of the Department of Citywide Administrative Services; and
 - d. ensuring that all participants in the 2009 Combined Municipal Campaign acknowledge any donation that is contributed through the Combined Municipal Campaign if it is so requested by the donor.

All applications to serve as Coordinating Agency must be submitted no later than **September 14, 2009** to:

New York City
Department of Citywide Administrative Services
Office of Special Programs
1 Centre Street, Room 2130 South
New York, New York 10007

**CITY OF NEW YORK
COMBINED MUNICIPAL CAMPAIGN**

APPLICATION FOR COORDINATING AGENCY

(This is not an application for participation in the Combined Municipal Campaign. Applications for Participating Agency will be provided separately.)

1. Full legal name of organization: _____
2. Address of principal place of business: _____

Telephone number: (____) _____
3. Contact person: _____
Title: _____
Telephone number: (____) _____
4. Date and place of incorporation: _____

Month fiscal year begins: _____
First year of operation: _____
5. Please provide registration number on file with Attorney General of the State of New York:

PLEASE PROVIDE THE INFORMATION REQUESTED IN APPENDICES A, B, C, D, E, F AND G AND IN ADDITION SUBMIT THE FOLLOWING DOCUMENTS WITH YOUR COMPLETED APPLICATION NO LATER THAN SEPTEMBER 14, 2009 TO:

New York City
Department of Citywide Administrative Services
Office of Special Programs
1 Centre Street, Room 2130 South
New York, New York 10007

PLEASE PROVIDE:

1. A copy of Certificate of Exemption [Form 501(c)(3)] from the payment of Federal Income Tax.
2. Financial statements for your last two fiscal years of operation, showing contributions and other revenues received, administrative and overhead expenses, cost of operations, other significant financial data; and a specification of the extent your operations have been carried out by volunteers' services. A detailed explanation must be submitted for organizations where fund-raising and administrative costs exceed 40 percent of total income.
3. Copies of certificate of incorporation, charter and bylaws.
4. A copy of the latest external audit by a certified public accountant. (The audit must have been conducted within the last two years.)
5. A listing, by corporate or registered business name, address, and name of the authorized principal representative, of each constituent charitable, nonprofit organization included in your organization. The applicant shall, in addition, certify that it has examined and established compliance by all of its constituent organizations with the conditions and requirements of eligibility specified in Section four of the "Rules and Regulations Governing Municipal Employees' Charitable Contributions," and shall provide a copy of the latest agreement between the applicant and each constituent charitable nonprofit organization included in the organization.

For additional information, please call (212) 669-3290.

I, _____, hereby certify that all of the information in this application to the best of my knowledge is correct and complete.

Authorized Signature

Date

Title

APPENDIX A

Please provide a concise description of your organization's structure, origin, and history of activities in New York City.

APPENDIX B

Please provide names, titles, and addresses of directors, principals, and executive officers.

APPENDIX C

Please provide a list of names and addresses of the governing board. Please include a copy of the board roster (list should identify the titles of office held by board members and their addresses), and the bylaws which define the duties and functions of the governing board and officers (an explanation must be submitted if governing boards have fewer than three meetings per year).

APPENDIX D

Please provide a written Statement of Qualification which shall include the following: 1) a list of similar work performed as Campaign Coordinator within the last ten years, including size and scope of the campaigns; and 2) the qualifications and experience of the senior personnel your organization plans to assign to the Combined Municipal Campaign, including an organization outline or chart which includes the names, titles and resumes of all personnel who will be assigned to the campaign, and reporting relationships and geographic locations within the campaign. Resumes of personnel should include past responsibilities on similar campaigns.

APPENDIX E

Please provide a written campaign plan showing how your organization can administer an efficient and effective Combined Municipal Campaign. Please include a Combined Municipal Campaign budget that details all costs estimated to be required to operate the Combined Municipal Campaign. The costs in the budget shall be based on estimated actual expenses, not on the percentage of the funds raised in the campaign.

APPENDIX F

Please provide a statement of your organization's plan and program for performing charitable services within the City of New York over the next three years, with a particular description of projected benefits to employees' communities of residence.

APPENDIX G

Is your organization presently under investigation by the Office of the Attorney General of the State of New York or any other law enforcement or investigative body? If so, please elaborate.