

Oregon Charitable Checkoff Pre-Qualification Guidelines and Process

Introduction: An organization may “pre-qualify” by sending application materials as early as possible prior to July 1 in the year of application. Signature petitions are not required at that time, only application materials. See the pre-qualification process below.

The Commission will review these documents and determine if the organization qualifies for listing in the tax instruction booklet, or request additional information. Pre-approval is **contingent** upon the submission of the 10,000 signatures which must be gathered within the two year deadline. All additional information and signatures must arrive at the Department of Revenue by the July 1 deadline.

Pre-qualification process:

1. Submit your completed application materials to Oregon Department of Revenue, Charitable Checkoff Commission, 955 Center St. NE, Salem OR 97301-2555, **as promptly as possible**, prior to July 1 in the year of application. **SIGNATURE PETITIONS ARE NOT REQUIRED TO BE SUBMITTED AT THIS TIME.**

Application materials consist of the following:

- a. Complete financial statements for the last two fiscal years. Umbrella organizations representing a group of affiliates must submit combined financial statements.
 - b. A letter from the Charitable Activities Section, Oregon Department of Justice, stating that your organization complies with ORS 128.610-128.769. For Questions contact the Charitable Activities Section at 100 SW Market St., Portland OR 97201-5702, phone 971-673-1880.
 - c. Evidence that your organization received at least \$1 million in contributions in the year prior to application (pages 1-4 of IRS Form 990 income tax return.)
 - d. A narrative statement addressing the following:
 - A brief history of your organization.
 - How your organization supports private charitable causes and engages in private activities that are consistent with state policies and programs.
 - How Checkoff resources will fund programs resulting in benefits to the state that are unlikely to occur under existing public and private programs.
2. The Oregon Charitable Checkoff Advisor will initially review all application materials, listing any questions/concerns and send to the commission members.
 3. Commission members will review materials submitted, documenting any additional questions/concerns and responding to the Checkoff Advisor.
 4. The Checkoff Advisor will prepare an “**initial**” acceptance letter, **contingent** upon validation of the required 10,000 signatures and “**final approval**” from the Charitable Checkoff Commission.

5. Organizations may start the process of gathering the 10,000 signatures at any time. However, signatures are only valid for two years.

Organizations are encouraged to submit their completed signature petitions, in small numbers, rather than waiting until they have collected all 10,000 signatures, before sending them in. This will help expedite the approval/verification process.

6. The last step in the approval process is to have Oregon Department of Revenue validate the 10,000 signatures gathered by each organization. If an organization meets the quota of 10,000 signatures, the Department will notify the organization and the Commission members, confirming acceptance of the signatures gathered.
7. After validation of petition signatures, final approval is granted by the Commission at the annual Charitable Checkoff Commission meeting, typically in July or August.

Your organization must gather 10,000 signatures from registered Oregon voters. You must use the Charitable Checkoff Commission form for this purpose. Altering this form invalidates all signatures. Signatures must be collected in person. Mailing this form to individuals for the purpose of gathering their signature is prohibited.

Call the Department of Revenue at 503-945-8633 to obtain the signature form or visit our website at: <http://www.oregon.gov/DOR/programs/individuals/Pages/charitable.aspx>

Submit your completed application and signature petitions to:

Charitable Checkoff Commission
Oregon Department of Revenue
955 Center Street NE
Salem OR 97301-2555

Application and signatures are due no later than:
July 1 of the year the final application is to be made.