

## **Private Organization Documents**

### **Which Do I Need to Send In?**

You must send in one of each category, some categories have 2 versions of the document, only send in the one that applies to your organization. **You will send in one document per category.**

Instructions/requirements listed below.

#### **Operate as PO Memo:**

1.0 Request to Establish Memo Template: Required for New PO's requesting to become a PO or requesting to start up again if inactive/retired for a period of 12 months.

1.1 Request of Recertification Memo Template: Required for already Established PO's requesting to continue to operate as a PO.

#### **Liability Insurance:**

2.0 Example Proof of Liability Insurance: Proof of Insurance is required to be updated yearly in January (or sooner if the policy expires outside of January).

2.1. Insurance Waiver Template (JA Approved Version): If your PO opts to take on the full liability of operating without Liability Insurance, you can request a Waiver. If you are approved, the waiver will need to be updated yearly in January.

#### **Liability Understanding:**

3.0 Letter of Liability Understanding Memo Template: Required with 2.0 Proof of Liability Insurance. This satisfies the requirements in DAFI 34-106 for PO Understanding of Liability Insurance. To be updated yearly in January with new insurance.

3.1. Waiver Letter of Liability Understanding Memo Template: Required with 2.1 Insurance Waiver Request. This satisfies the requirements in DAFI 34-106 for PO Understanding of Liability Insurance. To be updated yearly in January with new Waiver Request.

#### **Officer List:**

4. Officer List Template: This is required for all PO's. Please use the excel template, this is the only thing you will send me that is not a PDF. This is to be updated yearly in January OR when any changes in officer information happens.

#### **Financial Statement:**

5. Financial Statement Template: This is required for all PO's. Please use this template & if you qualify for an additional audit such as an Accountant or CPA review, you will also need to submit those in addition to this form. The Accountant/CPA Audit/Reviews can be in whatever format they provide you as part of their services. This is to be updated yearly in January and at the end of your financial year per your Constitution and Bylaws.

### **Constitution & Bylaws:**

6. Constitution & Bylaws Sample Example: This is required for all PO's. You do not have to use this exact template; this is the example provided by the AF Services Center. Please email the Constitution & Bylaws to [75FSS.Private.Orgs@us.af.mil](mailto:75FSS.Private.Orgs@us.af.mil). This will be coordinated through JA for review by the 75 FSS as they need confirmation from JA that it meets the requirements before sending it off for Signature/Approval.

### **Tax Exempt: (You are not required to be Tax Exempt; This is all through the IRS)**

Donations are considered taxable income and must be reported on a tax return to the IRS. To avoid having to pay taxes on Donations of Items or Cash, you can sign up to be Tax Exempt with the IRS. Provide a copy to 75 FSS when you get Tax Exempt Status. Proof of Tax-Exempt Status is only required once, to be kept on file with your PO's documents. This is for audit purposes.

7.0 Tax Exempt IRS FORM 1023: This form will be required to be tax exempt. You fill it out online. There are other forms available as well, please review IRS website for more information.

7.1. IRS Form SS-4 EIN: This form is for an Employer Identification Number to use on the Tax-Exempt Form 1023. You fill it out online.

### **Fundraiser Form:**

Fundraiser Application Form is required for all Private Organizations Fundraisers. Please retain a copy on file to submit at least 30 days in advanced of your Fundraiser requests for proper approval time. You need to wait for approval before you advertise for your event in case it cannot be approved. For more information, please visit the HillFSS Fundraiser webpage.

REMINDER: PO's cannot use Government Email to Advertise any Fundraisers.

### **SEND ALL DOCUMENTS TO:**

All documents need to be emailed to [75FSS.Private.Orgs@us.af.mil](mailto:75FSS.Private.Orgs@us.af.mil). Please save them as individual PDFs (the Officer List is the only Excel sheet you will send in). We route the documents to different areas so having them all individual is best. I will send it back to you in one PDF Portfolio for your record.

After all documents are received, the Private Orgs Coordinator will review all documents, send the required documents to JA Legal for Review and Coord all documents through eSSS as required. You can expect this process to take 4-8 weeks once all documents are provided to [75FSS.Private.Orgs@us.af.mil](mailto:75FSS.Private.Orgs@us.af.mil).