

COMMUNITY INVESTMENT APPLICATION GUIDELINES

Below is a list of criteria, based on Charleston County School District (CCSD) requirements, that will be taken into consideration when reviewing and recommending community investment funding. This guideline is not to be used as a guarantee to receive funding.

- Ability of the agency to demonstrate a defined purpose through wraparound services to the students of Charleston County School District
 - Purpose is defined as *the promotion of health, safety, and general welfare (i.e. feeding, clothing, tutoring, etc.) of all (or at least a substantial part thereof) of the students*
- Stability of the organization
 - Length of existence and number of years serving in the Charleston area
 - Financial condition (unrestricted financial reserves as compared to annual expenses from last completed fiscal year)
- Reliance on government funding
- Effectiveness of the organization's spending
 - Percent of expenses spent directly on programs
 - Measured by the SC Secretary of State
- Wraparound Services provided to the students of Charleston County School District
- Application is received by its appropriate deadline and is complete and accurate
- If recurring applicant, a verifiable performance report is completed fully and accurately

COMMUNITY INVESTMENT APPLICATION REQUIREMENTS

Below is a list of requirements for approved community investment funding applications.

- ✓ A signed agreement as a pre-requisite to receiving funds that describes how the funds will be used and by when they will be spent
- ✓ Agreement that monies spent differently than described in the application or spent on political activities must be returned to CCSD
- ✓ Agreement that any unspent funds must be returned to CCSD within 30 days of the end of the program or the District's fiscal year
- ✓ A request in writing, after July 1, 2024 and before June 30, 2025, to the District's Financial Services Office to receive the funds. Funding may be delayed or withheld due to unanticipated impacts to the District's revenue sources.
- ✓ A final report on the use of the funds must be submitted within 30 days of the end of the program or fiscal year

COMMUNITY INVESTMENT APPLICATION CHECKLIST

- Submit Application by February 1, 2025, deadline. No late applications will be considered.
- Complete Current Application
 - *If returning to the Committee for funding, a completed Performance Report must be completed for previously funded programs (last page of application).*
- Attach a recent financial report
 - Annual audit if revenues are \$1,000,000 or more, or
 - IRS Form 990 if revenues are less than \$1,000,000, or
 - Financial statement if revenues are less than \$1,000,000
 - Demonstrate all entities providing funding to your organization
- Provide Proof of Exemption Status
 - Copy of Tax Exempt Determination Letter
 - Federal Employee Identification Number
- W-9 (**First time applicants only**)
- If possible, email all items to cfo@charleston.k12.sc.us or mail to:

**Charleston County School District
 Community Investment Application
 Executive Director of Financial Operations
 3999 Bridge View Drive
 North Charleston, SC 29405**

Failure to provide completed forms on time may disqualify the applicant from receiving support. Any proposed funding for applicants will be included in the Proposed Budget to Board of Trustees during the budget process. Applicants may be requested to appear before the Audit & Finance Committee to present their request. All meetings will be duly advertised, once scheduled. Applicants will be notified in writing of the Board’s decision regarding funding.

Staff will rank all applications with the following scales, for a total of 20 points, with rankings presented to the Committee.

| Length of time serving District | Percent spent directly on programs | Number of District population directly served annually | Required service in lieu of District | Reliance on government funding |
|---------------------------------|------------------------------------|--|--------------------------------------|--------------------------------|
| > 10 years 1 | 0% - 50% 1 | 0 - 20,000 1 | No 0 | 76% - 100% 1 |
| > 20 years 2 | 51% - 80% 2 | 20,001 - 40,000 2 | Yes 4 | 51% - 75% 2 |
| > 30 years 3 | 81% - 90% 3 | 40,001 - 60,000 3 | | 26% - 50% 3 |
| > 40 years 4 | 91% - 100% 4 | > 60,000 4 | | 0% - 25% 4 |