



Frequently Asked Questions (FAQs)
National AIM-IRS
CFC OPERATING GUIDELINES
AIM-IRS CFC Mission Statement



- To provide Volunteer Income Tax Assistance to low income people;
- To participate in community outreach and mentoring programs geared toward youth;
- To present educational workshops and scholarships for IRS career advancement

General Questions

Q1 - What is the Combined Federal Campaign (CFC)?

A1 - The CFC operates under the umbrella of local United Way Campaigns and is the Federal Government's initiative for charitable giving for all Federal employees and negates the individual fund raising efforts in the work place.

Q2 - When does the CFC Campaign begin and end?

A2 - The CFC Campaign begins in September 15 and ends December 15 of each year.

Role and Responsibility of National AIM-IRS

Q3 - What is the role of the National Executive Secretary?

A3 - The National Executive Secretary prepares the application to the CFC. It is his/her responsibility to insure that documentation for projects, etc. is in order and meet the CFC Guidelines. Further, he/she ensures that the application is submitted timely and accurately.

Q4- What is the role of the CFC Treasurer?

A4 – The CFC Treasurer maintains records and disburses funds in accordance with established guidelines and properly documented requests for funds.

Q5 - What is the role of the Internal Audit Team of National AIM-IRS?

A5 - The Internal Audit Committee reviews records maintained by the CFC Treasurer for accuracy, conducts independent review via confirmations with CFCs across the United States, and assists in the development of better internal controls. Just as importantly, it is generally after their verification of the accuracy of the Treasurer's records that funds become available to local AIM-IRS chapter. This should usually coincide with the National ABMTS.

Q6- How long do chapters have to use AIM-IRS CFC funds?

A6 - The process and policies established by National AIM-IRS requires that funds be made available to chapters after the internal audit team certifies the accuracy of the National CFC Treasurers' reports. Chapters have one year to properly request and use their funds after they are made available.

Role and Responsibility of Local Chapter

Q7 - Who is responsible for initiating the process to obtain reimbursement of funds for the local chapter?

A7 - The local chapter's members or elected leaders can initiate the process at their respective meetings. It is generally understood that the chapter members approves the project for which reimbursement or disbursement of funds is being requested. Logically, there should not be a request for CFC funds if the chapter has not properly voted and approved the request.

Q8 - What are some approved projects for AIM-IRC CFC funds?

A8 - Scholarships to universities and colleges for deserving high school students is an excellent example for the use of CFC Funds. Also, the sponsorship of a school for needy children (books, supplies, and other packets) is another example.

Q9 - What is an example(s) of projects that will not be approved by AIM-IRS CFC?

A9 - Scholarships to attend the National AIM-IRS conference is not a valid scholarship. Another example is a donation or contribution to another IRC 501(c) (3) organization.

Q10 - Where does my Chapter secure a copy of the application for AIM-IRS CFC funds?

A10 - The AIM-IRC CFC application for funds is included in the CFC guidelines. The most current application form is on the AIM-IRS website at aimirs.org.

Q11 - Who approves the local chapter's initial request?

A11- The local chapter president is the first approving official in the chain as outlined on the AIM-IRS CFC Application Form.

Q12- Will my chapter have to first spend its own funds and secure reimbursement?

A12- This is the preferable method. In this regard, the event must have a date certain and documentation submitted immediately after the event.

Q13 – How long will it take for my chapter to receive reimbursement or advance payments for properly documented expenditures?

A13- The process has been streamlined to allow for at least three (3) approvals. If all documentation is in place, a disbursement or reimbursement check should be issued within 20 days of request and in no event beyond 30 days. Additionally, to help expedite the process, an electronic PDF file has been developed which will allow for digital signatures and full electronic processing.

Role and Responsibility Regional Vice President

Q14 - Who are the approving officials beyond the local chapter president?

A14 - The Regional Vice President (**RVP**) is the second approving official. The request is then routed to the National Executive and to the National President. The Treasurer disburses funds and is the final point in the

process.

Q15 - What other roles does the RVP have in the CFC fund request?

A15- The RVP should take a leadership role in insuring that CFC funds are disbursed in an equitable manner among the chapters in the region he or she serves

Q16 - What if the Regional Vice President disapproves my chapter's application for CFC funds?

A16 - You should first try to resolve the problem with the RVP. The concern should be elevated within the chain that has already been established (ex. Regional Representative, etc.)

Q17 - What should my Chapter or Region do if we do not receive any information regarding the availability of CFC funds?

A17 - The availability of CFC funds should be discussed at regional and local meetings. If this is not happening, it may be indicative of a systemic problem in the region. The President or National Senior Vice-President should be contacted regarding this matter.