

## Community Shares Membership Application - 2011



*Community Shares of Greater Milwaukee raises funds for local nonprofits focused on social justice, the environment and animal welfare. We respect donor choices and make giving simple.*

### MEMBERSHIP APPLICATION – 2011

Thank you for your interest in membership with Community Shares of Greater Milwaukee – Southeastern Wisconsin's only workplace-giving federation supporting organizations that working for social justice, animal welfare, and a healthy environment. Member organizations are part of a team that works to ensure the success of the federation and its individual members. Primary member benefits include revenues from the exposure of your organization to over 50,000 potential donors in workplaces throughout the Greater Milwaukee area. Other benefits include a steady flow of educational materials and interactive website technology designed to promote members' programs and causes.

**Please Note:** This application period qualifies applicant groups for the Fall 2012 workplace giving campaign (as the 2011 campaigns are already underway). Quarterly distributions for funds raised during the 2012 campaigns will be made beginning in September 2013.

#### The Community Shares Membership Application Process:

- 1) Submit the completed application and the following materials to Community Shares by Oct. 1, 2011
  - Mission Statement.
  - Articles of Incorporation.
  - By-laws.
  - Current approved budget.
  - List of current Board of Directors with addresses.
  - IRS Form 990 or 990-EZ for FY 2010 or later. Must state that organization's accounting is done on the accrual basis (in Box F on the full 990 and Box G on the 990EZ)
  - Board of Directors resolution approving application to Community Shares of Greater Milwaukee.
  - Minutes from 2010 Annual Meeting (if available).
  - Latest annual report.
  - IRS 501(c)(3) letter certifying your organization's tax exempt status.
  - Any correspondence from regulatory or other agencies regarding potential disqualification of tax exempt status.
  - Current Wisconsin Department of Regulation & Licensing (DRL) certificate for Charitable Organizations.
  - Independent audit of the financial statements, including A133 and State Provider Audit (as applicable) and management letter and/or no material weakness letter (as applicable) and required communication letter (as applicable) for FY 2010 or later. Must state that the organization's accounting is done on the accrual basis.
    - o If the organization doesn't conduct an audit report, most recent internally generated financial statements (Profit and Loss Statement and Balance Sheet)
  - Copy of non-discrimination policy (see SECC parameters, p. 2)
  - A 25-word statement to describe your organization and its activities.
  - If the organization name on any submitted documentation is not the name the organization is currently using, you must provide documentation from the state or IRS authorizing use of the current name.
  - If organization is a chapter or affiliate of a national organization, additional information detailing the relationship between your organization and the parent organization may be required.

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2) Submit necessary materials to Community Shares to qualify for the State Employees Combined Campaign (SECC) and Combined Federal Campaign (CFC). The SECC campaign application is due in January and the CFC application is due in March.

Please see below for more information about qualifying for these campaigns. Your work in supplying the necessary materials to qualify for these campaigns is a factor in evaluating your organization's fitness for membership.

3) Submit additional financial documentation as requested by the Community Shares prospective member financial review team. This information will be requested after the initial phase of review of your membership application and the accompanying materials (listed in item 1, above).

### Information on Qualifying for the State Employees Combined Campaign (SECC) and the Combined Federal Campaign (CFC):

#### Deadlines:

State Employees Combined Campaign: Application due in January 2012

Combined Federal Campaign: Application due in March 2012

**The State Employees Combined Campaign (SECC) Charitable and Umbrella Organization Certification Form** is required by the State of Wisconsin and qualifies you for entry into all area public sector combined campaigns. It requires, in addition to the documents provided to Community Shares with your membership application, a copy of the following documents:

- Signed copy of policy (and Board minutes showing approval of policy) showing that funds gained through State giving campaign are used only for purposes stated.
- Approved annual Budget that will be current as of January 15, 2012 (and Board minutes showing its approval).
- Signed copy of policy (and Board minutes showing approval) stating that:
  - Publicity and promotional activities are based on actual program & operations.
  - Your organization does not sell or permit others to use lists of SECC contributors.
  - Your organization does not mail unordered tickets or merchandise requesting money.
- Annual Report for 2010 or later (See SECC criteria, below).
- Titles and annual salaries of personnel earning in excess of \$20,000 per year.
- You must submit the Department of Regulation and Licensing tax exempt certificate that will expire June 30, 2012 with your SECC application.

*SECC Parameters for Non-Discrimination Policy* (the policy may be more inclusive but must include the following):

This organization has a board-approved policy and procedure of nondiscrimination in regard to race, color, national origin, handicap, age, sexual orientation, or sex, applicable to persons served by it, to staff employment, and to membership on its governing board. It also has a board-approved policy and procedure of nondiscrimination in regard to religion applicable to persons served by it.

*SECC Parameters for Annual Report*

This organization prepares an annual report to the general public which includes a full description of the activities and accomplishments of the organization, the names of our chief administrative personnel and a full disclosure of the source and use of contributions.

### Combined Federal Campaign Application

In addition to requirements listed above, the Combined Federal Campaign requires:

- Your choice of 3 letters (part of the coding system used by the campaign) to let donors instantly identify your organization's activities by the letters used.
- If your organization submits a 990EZ to the IRS, a pro forma 990 must be filled out and submitted with the application.
- Your IRS form 990 and audited financial statements must cover the same time period, and that time period must be one ended on or after June 30, 2010.
- Your hours of operation (Must be 15 hours or more per week to qualify)

**Community Shares Membership Application - 2011**

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Fax: \_\_\_\_\_

Web site: \_\_\_\_\_

Executive Director \_\_\_\_\_

E-mail: \_\_\_\_\_

Liaison: \_\_\_\_\_

Email: \_\_\_\_\_

Title (if different from Exec. Director): \_\_\_\_\_

Is your organization a charitable, not-for-profit corporation with IRS 501(c) (3) status?

Yes \_\_\_\_ No \_\_\_\_ Year incorporated \_\_\_\_

Is this 501(c) (3) separate and apart from any national organization? Yes \_\_\_\_ No \_\_\_\_

If "no," how much of your funding stays at the local Milwaukee organization? \_\_\_\_\_

Does your organization also have a 501(c)(4) arm?

Yes \_\_\_\_ No \_\_\_\_

If yes, what is the name of the (c)(4) arm? \_\_\_\_\_

Do your Board members serve without compensation? Yes \_\_\_\_ No \_\_\_\_

Do all your Board members contribute financially to your organization? Yes \_\_\_\_ No \_\_\_\_

**LOCAL PRESENCE**

Who is the audience(s) you are trying to reach?

What is your geographic service area?

How many people did your organization serve last year? \_\_\_\_\_

Do you publish a newspaper or newsletter? Yes \_\_\_\_ No \_\_\_\_

If yes, how often? \_\_\_\_\_ Circulation: \_\_\_\_\_

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**GOALS, MISSION, EXPECTATIONS**

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What is your organization's Mission:

What were your organization's major activities and programs during the past 12 months?

How is your organization meeting your mission? What institutions, social policies or attitudes does your organization challenge?

Why do you want to join CSGM and what does your organization bring to our family of agencies?

What are your expectations of membership in CSGM?

Do you receive revenue from any other workplace-giving federation (United Way, UPAF, CHC, Hunger Relief Fund, etc.)?

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### **PARTICIPATION REQUIREMENTS**

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- 1) Attend one CSGM orientation.
- 2) Attend CSGM Annual Meeting.
- 3) Invite a CSGM representative to one board meeting per year.
- 4) Write Thank You letters to donors who give to you through Community Shares.
- 5) Offer your employees the option of giving through an annual CS campaign.
- 6) Participate in campaign development or outreach work (i.e., speaking, tabling) as agreed upon with staff (See Mandatory Campaign Requirement document for more information).

### **OTHER REQUIREMENTS**

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- 1) Adhere to policies and obligations, such as providing financial support to Community Shares through membership dues and administrative assessments as determined annually.
- 2) Provide Community Shares with annual documentation as required to participate in payroll deduction campaigns.
- 3) Use small CSGM branding on letterhead, envelope, brochure, newsletter website, email, and office or door. Co-branding helps inform the public that they can support you through CSGM.
- 4) Demonstrate responsible management through a financial system based on Generally Accepted Accounting Principles and established mechanisms to assure ongoing and long-range programmatic and fiscal planning and evaluation.
- 5) Organization either (a) makes decisions about the use of funds received from Community Shares independent of any national or parent organization, or (b) otherwise demonstrates that funds received from CS will be used in support of program services in Eastern Wisconsin.

### **DISTRIBUTION OF FUNDS RAISED THROUGH COMMUNITY SHARES**

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Member organizations receive all funds designated to them through workplace campaigns minus a small administrative fee.

### **MEMBERSHIP FEES**

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First year membership fee is \$500. Thereafter, annual dues are based on total revenue reported on each organization's most recent 990 or 990EZ and are assessed per a graduated scale ranging from \$500 to a maximum of \$4,000 per year. Dues should not be paid until after the organization is approved for membership and officially notified.

**Please return to: Community Shares of Greater Milwaukee  
1845 N. Farwell Ave.  
Suite 102  
Milwaukee, WI 53202**