

Community Shares of Mid Ohio

NEW MEMBER APPLICATION

Checklist

Thank you for your interest in membership with Community Shares of Mid Ohio. We've crafted this checklist to help you prepare documentation and information required for the application. Please note that this is not a comprehensive list of all application requirements.

ORGANIZATION COMPLIANCE

- City of Columbus Solicitation Permit – Up to date & renewed yearly
- IRS Letter of Determination – 501(c)(3) status active for 2+ years
- Certificate of Continued Existence – from Ohio Secretary of State
- IRS 990 Form (or Proforma) – Submit full 990 or 990-N/EZ + Proforma
- Local Presence Letter - ***Required ONLY if your organization is a chapter or an affiliate of a state or national organization without its own IRS 501(c)(3) Letter of Determination.***

ORGANIZATIONAL INFORMATION

- Board of Trustees List – Names, roles, emails (PDF, Word doc, or Excell)
- Staff List – Names & emails or phone numbers (PDF, Word doc, or Excel)
- Organization Bylaws – Board-approved (PDF)
- Non-Discrimination/EEO Policy – Board-approved (PDF)
- 25-Word Statement – Concise description of services/impact


FINANCIAL & ADMINISTRATIVE CRITERIA

- Fundraising & Admin Costs (FRA) Certification – Must be under 30% (with an explanation if higher)
- Membership Dues – \$275 non-refundable fee

MARKETING AND SUPPORT MATERIALS

- Health & Human Services Documentation – Brochures, pamphlets, or flyers (no annual reports) (PDF or Word doc)

Need guidance to prepare this documentation? We've got you covered with full details and instructions in the following pages to assist you. We look forward to receiving your application!



Community Shares of Mid Ohio

NEW MEMBER APPLICATION

Instructions For Documentation

Are you unsure of how to obtain some of the required documents? Are you looking to verify your information and documentation? We've provided detailed instructions to assist you in reviewing and verifying your documentation to make completing our membership application easier for you.

ORGANIZATION COMPLIANCE

City of Columbus Solicitation Permit

- Confirm your solicitation permit is up to date or apply for a new permit. The city application can be found [here](#).
- Renew annually as required by municipal code.
- Contact Glen Rutter at (614) 645-4297 if needed.

IRS Letter of Determination

- Provide proof of 501(c)(3) status (active for at least 2 years).
- **Ensure the address matches the IRS Form 990 filing.**
- If your address does not match, you can apply for an updated IRS Letter of Determination by doing the following:
 - **It takes 8-10 weeks to receive the final document from the IRS, so complete this ASAP.**
 - Complete Form 8822- B [here](#).
 - Request a new affirmation letter [using the directions here](#).
 - Send an affirmation letter request and change of address [here](#).

Certificate of Continued Existence

- [Obtain this document from the Ohio Secretary of State.](#)
- Search your nonprofit name. Click show details next to your nonprofit.
- Scroll to the bottom and click the most recent "certificate of continued existence, domestic/reinstatement, domestic agent address change, domestic agent subsequent appointment, or domestic/amendment to articles", and click download image.
- After downloading the image, save the document.
- Must be renewed every 5 years.

Ohio Attorney General Registration Certificate

- [Find your status with the attorney general here.](#)
- Search under your organization name or EIN.
- Click details next to your organization's name.
- Scroll down and look for "Is the organization's registration status current?" - The answer must be yes.
- If the answer is yes, click print. Then save the document.
- If the answer is no, [go here to update your organization's AG filing.](#) Then follow the steps to save your updated filing above, after completing the necessary paperwork.

ORGANIZATION COMPLIANCE CONTINUED

State of Ohio Name Registration (if applicable)

- Required if your organization operates under a DBA (Doing Business As) name.
- Obtain this document from the Ohio Secretary of State.
- Search your nonprofit name
- Click show details next to your nonprofit
- Scroll to the bottom and look for the most recent “Trade Name/ Original Filing,” and click download image
- After downloading the image, save the document
- Must be renewed every 5 years.

IRS 990 Form (or Proforma)

- If you complete a full 990.
- Submit a fully completed IRS 990 (pages 1, 9, and 10) (Dated within 18 months of the application date)
- Page 1 (with both signatures) physical signature is preferred or 8879-TE e-File Signature Authorization
- Page 9 Statement of Revenue
- Page 10 Statement of Functional Expenses
- If you complete a 990 N or 990 EZ
- Submit 990 N or 990 EZ (Dated within 18 months of the application date)
- Complete Proforma which is pages 1, 9, and 10 of the full 990. (A blank 2024 990 can be found here.)
- This will not be submitted to the IRS, but simply to Community Shares of Mid Ohio and the campaigns.
- If you need help with this document, please reach out to kaylac@communityshares.net

Local Presence Letter

- **Required ONLY if your organization is a chapter or an affiliate of a state or national organization without its own IRS 501(c)(3) Letter of Determination.**
- Must be on official letterhead and signed by the Chief Executive Officer (CEO) or CEO equivalent of the national/state organization.
- Upload as a PDF document.
- A sample local presence letter is here for your reference.

ORGANIZATIONAL INFORMATION

25 Word Statement

Instructions for the 25-word statement

The descriptions should:

- Be 25 words or less
- Include a succinct explanation of what health and human services the organization provides and/or who the organization serves
- Do not use the organization's name
- Be written in complete sentences with subjects and verbs
- Exclude slang and industry jargon.
- Be written in the third person (i.e., no use of "we" or "you")
- Avoid using numbers at the beginning of the description. For example, 99 percent of workplace contributions, etc.
- Avoid acronyms that are not defined or include the acronym in the organization's title

Approved Description: Helps residents grow food, improve healthcare, strengthen communities, end conflict, build livelihoods, and recover from disasters.

NOT approved Description: Alphabet Soup Charities (ASC) helps residents and the community grow food and improve healthcare, strengthen communities and end conflict, build livelihoods, and recover from disasters. Also works with neighborhood children through a summer program.

FINANCIAL AND ADMINISTRATIVE CRITERIA

Fundraising and Administrative Costs (FRA) Certification

- Verify that your FRA does not exceed 30% of total revenue. If they do, include an explanation as to why your FRA was higher than 30% and a formal plan to reduce your FRA.
- To calculate your administrative costs, do the following:
- Go to your 990 or proforma (if you complete a 990 N or 990 EZ)
- Add the amount spent on "management and general" currently (Page 10, line 25C) to "fundraising" (Page 10, line 25D)
- and then dividing the sum above by "total revenue" currently (Page 9, line 12A).
- Then multiply the total above that by 100 to get your FRA percentage
- This must be lower than 30%

Membership Dues Payment

- \$275 membership fee that will be included at the end of the application (note: non-refundable).