

Community Shares Membership Criteria, Terms and Conditions

Any organization wishing to establish or continue membership with Community Shares (collectively, “Member Agency” or “you”) must conform to and/or comply with all membership criteria, terms and conditions described in this document (collectively, “Terms and Conditions”).

Section 1: Criteria for membership in Community Shares

Each current and prospective Member Agency must provide documentation that all required local, state, and federal compliance forms are up to date and filed with the appropriate entity. All forms are required to match exactly to the organization’s contact information on file with the IRS. These forms include but are not limited to the following:

- City of Columbus Solicitation Permit (an updated copy must be provided every year upon renewal)
- IRS Letter of Determination recognizing (i) 26 U.S.C. 501(c)(3) status for a minimum of 2 years from the date of approval and (ii) eligibility to receive tax-deductible contributions under 26 U.S.C. 170
- Certificate of Continued Existence from the Ohio Secretary of State
- Ohio Attorney General Annual Verification of Registration
- State of Ohio Name Registration (DBA [doing business as] if you are operating under a name that differs from your IRS Letter of Determination, the IRS Form 990, or audited financial statements)
- Acknowledgement letter from IRS verifying updated address, only required if address on IRS determination letter differs from other documentation.

Member Agencies must be self-determined, that is, not controlled by any other institution or agency. If a Member Agency is a chapter or affiliate of a national/state agency and does not have an IRS Letter of Determination for the local agency, the Member Agency must present a signed letter of local presence from the national/state agency.

Member Agencies must be governed by a voluntary board of trustees/directors of no less than 3 voting members who serve without compensation and have acknowledged no material conflict of interest. Member Agencies must provide a list of board members including one form of contact for each board member.

Member Agencies must adopt and employ the Standards of Accounting and Financial Reporting for Voluntary Health and Welfare Organizations.

Member Agencies must have completed an annual IRS Form 990 filing and provide a copy at the time of renewal. All 990s must have a beginning date within 18 months of the application date. Page one of the IRS 990 form must be signed. A physical signature is preferred, but an electronic signature with a PIN will be accepted. If the Member Agency files 990-EZ or 990-N, the Member Agency must also submit completed pages 1, 9, and 10 of the full IRS Form 990. (These completed pages are required for application purposes and used to calculate your FRA (Fundraising and Administrative) percentage. If the Member Agency is a local office of a regional or national organization, the IRS 990 for that organization may be used.

Member Agencies must submit to Community Shares a Conflict of Interest Policy approved by their board of directors/trustees with respect to their clients, officers, employees, and volunteers.

Member Agencies must adopt and enforce Non-discrimination/Equal Employment Opportunity policies, approved by their board of trustees/directors, which comply with all relevant City of Columbus, state, and federal laws and regulations concerning clients, officers, employees, and volunteers.

Each Member Agency must certify, as of the date it submits its application for membership, that the Member Agency does not knowingly employ individuals or contribute funds to entities or persons on either the U.S. Department of Treasury's Office of Foreign Assets Control Specially Designated Nationals List or the Terrorist Exclusion List.

Member Agencies must have a published mission statement, created by their board, that guides the decision-making and work of the Member Agency.

Member Agencies must be committed to challenging injustices and supporting social change in one or more of the following ways:

- Advocate for a more equitable distribution of resources, wealth, and power through information and education;
- Provide individuals with the tools to act together to create change on a systemic level;
- Advocate for the elimination of social, economic, cultural, and political barriers that keep people from fully participating in our society;
- Promote respect for the natural, animal, and/or human environments and their sustainability; and/or prevent discrimination.

Member Agencies may not be a part of any program operated, managed, or controlled by the government or by any educational institution.

Service organizations with a religious affiliation are eligible for membership if the services they provide meet the definition of “Direct Health and Human Services” and are provided without regard to the religious beliefs or affiliation of those receiving the services. Such service organizations must also have their own 501(c)(3) designation and their own board of directors, separate from the church or religious organization with which they are affiliated.

Direct health and human services are defined as any combination of programs designed to assist those in need. Examples of direct health and human services are programs aimed at one or more of the following:

- adoption assistance
- emergency shelter care and relief services
- family, child and adult day care services
- food and nutrition services
- foster care for children and adults
- health support services; or a combination of programs or services specifically designed to meet the needs of children and youth, the ill and infirm, the mentally and physically challenged, the elderly, poor, minorities or women.
- information, referral and counseling services
- neighborhood and community organization services
- preservation of the rights of animals, for those animals that provide direct benefits to people
- programs or services for school age children with special needs
- protection, preservation or restoration of the air, water and land, if these provide direct benefits to people
- recreational services
- safety and protective services for children and adults
- safety services
- service, support, research and education in the health fields
- services related to the management and maintenance of the home
- social adjustment and rehabilitation services
- the preparation and delivery of meals
- transportation services

Member Agencies must submit documentation describing the health and human services provided by the agency. Acceptable marketing materials include brochures, pamphlets, or charity fliers. Annual Reports will not be accepted.

Member Agencies must have a regular goal-setting process that creates goals that are focused both on the program(s) component and the internal work of the agency (the work caring for the agency, such as board development, leadership development, fundraising, planning, etc.).

Member Agencies must have administrative costs of 30.0% or less. Administrative costs are defined as an organization's percentage of total support and revenue spent on administration and fundraising as listed in the organization's 990. If the Member Agency has administrative costs greater than 30.0% of total revenue, they must demonstrate to the satisfaction of the review committee these costs are reasonable and include a formal plan to reduce these expenses. FRA (Fundraising and Administrative) percentages in excess of 55% will be denied.

Member Agencies agree to pay their share of campaign costs as determined by the workplaces and third-party campaign managers, based on the Member Agencies share of contributions received.

Participation in another major fundraising federation does not prohibit Community Shares membership.

Each Member Agency must upload any documentation required under these Terms and Conditions by the deadlines established, and in the manner described, in the instructions provided by Community Shares staff annually. Documentation will be reviewed internally by the staff of Community Shares. Documentation not signed or completed in its entirety will be declined.

Any documentation, registration, or permit (including, but not necessarily limited to a Member Agency's annual Form 990, solicitation permit, Attorney General Charitable Registration, or filings with the Ohio Secretary of State) that lapses during the membership year must be submitted within 7 days of receipt of updated documentation, registration, or permit via email to Community Shares.

Each Member Agency will identify itself as a member of Community Shares in both print materials (brochures, newsletters, event programs, etc.) and electronic means (websites, social media, etc.).

Each Member Agency appoints a primary contact to serve as the primary contact for all Community Shares information and provide the representative's name, title, address, email, and phone number to Community Shares' staff on an ongoing basis. Each

Member Agency is responsible for informing Community Shares of Mid Ohio of any changes in their contact information, organizational structure, and/or executive leadership.

In coordination with Community Shares staff, each Member Agency is responsible for conducting its own workplace giving campaign for its staff, volunteers, and/or board within its membership year.

Each Member Agency must provide financial support to Community Shares through dues and membership fees as determined by the Board of Trustees.

The Board of Trustees of Community Shares will review all new member agency applications for eligibility.

Disbursement of allocation checks to a Member Agency is contingent upon the Member Agency having paid its dues in full and honored its obligations under these Terms and Conditions.

Section 2: Member Agency Benefits

Proceeds from Combined Charitable Campaigns and other workplace giving campaigns are sent to Community Shares at varying times. So long as a Member Agency is in compliance with its obligations under these Terms and Conditions, Community Shares will issue accumulated funds to the Member Agency on a quarterly basis (typically April, July, September, and January).

Upon termination of an organization's status as a Member Agency, the former Member Agency will receive all funds pledged to it prior to the date of termination, less any amounts owed to Community Shares.

It is the Member Agency's responsibility to keep its contact information current with Community Shares. Community Shares will attempt to mail disbursement checks twice. After the second failed delivery, the funds will be held by Community Shares until delivery address is confirmed and/or updated.

Community Shares participates in a variety of information events representing our collective membership and does so at the request of the host and without preferential treatment for our Member Agencies.

Community Shares may provide some information and benefits exclusively to Member Agencies. Such benefits may include but are not necessarily limited to: newsletters, Member Agency-only pricing, education sessions, or sharing information with other Member Agencies or interested third-party organizations.

Section 3: Other Rules and Policies

Upon acceptance into Community Shares, each Member Agency acknowledges and agrees to abide by any and all policies approved by the Board of Trustees as they pertain to membership, including:

- Community Shares Bylaws
- Community Shares Brand and Logo Usage Policy
- Donor Name & Privacy Policy

Each of these policies are incorporated herein by reference.

Section 4: Member Agency Code of Conduct for Community Shares of Mid Ohio

Community Shares of Mid Ohio is dedicated to fostering a collaborative and respectful environment among its Member Agencies, staff, and workplace campaign partners. To ensure a harmonious and productive community, we have established the following code of conduct:

1. **Respectful Interaction:** Treat fellow Member Agencies, Community Shares staff, and workplace campaign partners with respect, dignity, and professionalism in all interactions.
2. **Collaborative Spirit:** Encourage collaboration, partnership, and mutual support among Member Agencies. Share resources, ideas, and expertise to strengthen the collective impact of our work.
3. **Open Communication:** Foster open, honest, and transparent communication within the Community Shares network. Listen actively, express ideas constructively, and be receptive to feedback.
4. **Confidentiality and Privacy:** Respect the confidentiality of sensitive information shared within the Community Shares network. Safeguard proprietary data and uphold the privacy rights of individuals and organizations, including, but not limited to, Community Shares' Member Agencies, donors, employees, and volunteers.
5. **Professionalism:** Conduct all activities with integrity, reliability, and professionalism. Honor commitments, meet deadlines, and communicate any challenges or conflicts promptly and responsibly.
6. **Diversity and Inclusion:** Embrace diversity, equity, and inclusion in all aspects of our work. Value and celebrate the unique perspectives, backgrounds, and contributions of all members of the Community Shares community.
7. **Conflict Resolution:** Address conflicts or disagreements respectfully and proactively. Seek resolution through open dialogue, mediation, or other

appropriate channels, with a focus on preserving relationships and achieving mutually beneficial outcomes.

8. **Compliance:** Adhere to all applicable laws, regulations, and policies governing nonprofit organizations, workplace campaigns, and Community Shares operations. Maintain the highest standards of legal and ethical conduct in all activities.
9. **Representation:** Represent oneself and one's organization accurately and truthfully in all interactions. Avoid making misleading or exaggerated claims that could harm the reputation of Community Shares or its Member Agencies.
10. **Commitment to Mission:** Remain committed to the mission and values of Community Shares, working collaboratively to advance social justice, equity, and sustainability in our communities.
11. **Terms and Conditions:** Acknowledge and comply with all provisions of the Community Shares Membership Criteria, Terms and Conditions.

This Code of Conduct may be interpreted broadly to support Community Shares' objectives and mission. By upholding this Code of Conduct, Member Agencies contribute to a supportive, inclusive, and effective network dedicated to creating positive change. Violations of this code may result in disciplinary action, up to and including termination of membership privileges in accordance with the Bylaws of Community Shares.

Section 5: Member Merger/Consolidation/Dissolution

Community Shares Member Agencies that dissolve or otherwise merge or consolidate with another entity shall file with the Ohio Secretary of State one of the following:

- Certificate of Merger
- Certificate of Consolidation
- Certificate of Dissolution

The Member Agency must submit a copy of the filing and final certificate to Community Shares within 30 days of filing.

The dissolving organization can select a current Community Shares member to receive any remaining pledges. If no member is selected, the remaining pledges will go to support Community Shares operations.

If a merger or consolidation changes the EIN of a current Member Agency, the Member Agency will be required to submit an application for new membership.

The remaining pledges for a merged or consolidated organization will be distributed to the successor organization.