

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 these Community Shares Membership Criteria, Terms, and Conditions (the “**Terms and Conditions**”).

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

Requirements for Membership by Tier

Current and prospective Member Agencies must satisfy and comply with certain requirements and criteria depending on their membership tier:

Full Membership Requirements

Member Agencies seeking to establish or maintain Full Membership (“**Full Member Agencies**”) are required to have maintained nonprofit status for a minimum of two years prior to membership and must submit the following documents related to Community Shares:

- IRS Letter of Determination recognizing (i) 26 U.S.C. 501(c)(3) status for a minimum of 2 years and (ii) eligibility to receive tax-deductible contributions under 26 U.S.C. 170
- State of Ohio Certificate of Continued Existence

Current and prospective Full Member Agencies are required to adopt and submit to Community Shares the following policy documents:

- Conflict of Interest Policy which has been approved by the Member Agency’s board of directors/trustees, with respect to its clients, officers, employees, and volunteers
- Nondiscrimination Policy and Equal Employment Opportunity Policy which have been approved by the Member Agency’s board of trustees/directors

and which comply with all relevant City of Columbus, state, and federal laws and regulations concerning clients, officers, employees, and volunteers

Each current and prospective Full 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 the IRS Letter of Determination. These forms include but are not limited to:

- Annual IRS Form 990, 990-EZ, 990-N
 - 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 990EZ 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.) If the Member Agency is a local office of a regional or national organization, the IRS 990 for that organization may be used.
- City of Columbus Solicitation Permit (an updated copy must be provided every year upon renewal)
- Ohio Attorney General Annual Verification of Registration
- State of Ohio Name Registration (DBA if you are operating under a name that differs from your IRS Letter of Determination, the IRS Form 990, or audited financial statements)
- Member Agencies must submit documentation describing health and human services provided. 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 (for example, board development, leadership development, fundraising, planning, etc.). Goals must state an established

base of community support, and programs or services that have a demonstrated impact in a local area of the State of Ohio.

- 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. In that case, the Member Agency must present a signed letter of local presence from the national/state agency.

Finances and Fundraising

All Full 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% 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. Fundraising and Administrative Percentage (**FRAs**) in excess of **55.0% will be denied.**

Full member Agencies agree to pay their share of campaign costs, based on their share of contributions received.

Each Full Member Agency is responsible for organizing and conducting its own workplace giving campaign for its staff, volunteers, and/or board. Member Agencies must hold their campaigns within the calendar year of their membership.

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 Full Member Agency 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.

Associate Membership Requirements

Member Agencies seeking to establish or maintain Associate Membership (“**Associate Member Agencies**”) must have obtained nonprofit status and must submit the following documents related to Community Shares:

- IRS Letter of Determination recognizing (i) 26 U.S.C. 501(c)(3) status and (ii) eligibility to receive tax-deductible contributions under 26 U.S.C. 170
- State of Ohio Certificate of Continued Existence
- State of Ohio Name Registration, if applicable (DBA if you are operating under a name that differs from your IRS Letter of Determination, the IRS Form 990, or audited financial statements)

Current and prospective Associate Member Agencies are required to certify that the following policies have been adopted by the Member Agency’s board of directors/trustees:

- Conflict of Interest Policy with respect to its clients, officers, employees, and volunteers
- Nondiscrimination Policy and Equal Employment Opportunity Policy which comply with all relevant City of Columbus, state, and federal laws and regulations concerning clients, officers, employees, and volunteers

Each current and prospective Associate Member Agency must certify that all required local, state, and federal compliance forms are up to date and filed with the appropriate entity, and that all forms match exactly to the organization's contact information on the IRS Letter of Determination.

These forms include, but are not limited to:

- Annual IRS Form 990, 990-EZ, 990-N
- Ohio Attorney General Annual Verification of Registration

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- Certificate of Merger
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- Certificate of Dissolution

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

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.

Universal Requirements for Membership

The following requirements and criteria apply to all current and prospective Member Agencies regardless of membership tier:

Presence in Ohio

To be eligible for new or continued membership with Community Shares, a Member Agency must provide services and maintain an office in the state of Ohio.

Governance Standards

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. All 990s must have a beginning date within 18 months of the application date.

Member Agencies must have 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 and 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 that, as of the date it submits its application for membership, 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 provide 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 and communities 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 shall not offer or conduct any program or service that will hinder, impede, frustrate, or otherwise conflict with another Member Agency's mission or activities.

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.

Cooperation with Community Shares

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

Member Agencies must appoint a representative 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. 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.

Member Agency Code of Conduct

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

- **Respectful Interaction:** Treat fellow Member Agencies, Community Shares staff, workplace campaign partners, and other partners with respect, dignity, and professionalism in all interactions.
- **Collaborative Spirit:** Encourage collaboration, partnership, and mutual support among Member Agencies. Share resources, ideas, and expertise to strengthen the collective impact of our work.
- **Open Communication:** Foster open, honest, and transparent communication within the Community Shares network. Listen actively, express ideas constructively, and be receptive to feedback.
- **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.
- **Professionalism:** Conduct all activities with integrity, reliability, and professionalism. Honor commitments, meet deadlines, and communicate any challenges or conflicts promptly and responsibly.
- **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.
- **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.

- **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.
- **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.
- **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.
- **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.

Required Documentation

Each Member Agency is required to complete and upload any and all documentation annually required by Community Shares under these Terms and Conditions (the “**Required Documentation**”) by established deadlines. Required Documentation generated or obtained by a Member Agency after the relevant deadline must be submitted immediately. Required Documentation will be reviewed internally by Community Shares, and Required Documentation not signed or completed in its **entirety** will be declined. Any Required Documentation (for example, IRS form 990, solicitation permit, AG, SoS continuation) that lapses

during the membership year must be submitted via email to Community Shares.

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
- Member Agency & Donor Privacy Policy

Each of these policies is incorporated herein by reference.

Finances and Fundraising

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

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

Member Agency Benefits

Full Member Agency Benefits

Community Shares offers some information and benefits exclusively to Full Member Agencies. These may include, but are not limited to:

- Newsletters, special pricing, and shared information by other members or by interested third-party organizations
- Access to all professional development sessions for free or at discounted rates, including a back catalog of previous sessions
- Access to roundtable discussions to network with fellow members, exchange ideas, and problem-solve.
- Access to all current and future fundraising opportunities, including workplace giving campaigns

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 organizations.

Fundraising Support

Full Member Agencies receive fundraising support from Community Shares. Proceeds from Combined Charitable Campaigns and other workplace giving campaigns are sent to Community Shares at varying times. Community Shares will issue accumulated funds to Member Agencies on a quarterly basis (typically April, July, September, and January). Should a Member Agency voluntarily end its membership with Community Shares and continue its operations, the former Member Agency will receive all funds pledged to it prior to the date the membership was terminated. However, if the Member Agency's membership was terminated for nonpayment of dues or failure to comply with these Terms and Conditions or any other Community Shares policy incorporated herein, or if the Member Agency does not continue its operations following the end of its membership, any funds pledged to the Member Agency prior to the end of its membership will not be disbursed to the withdrawing Member Agency and will remain the property of Community Shares.

Disbursement of allocation checks to a Member Agency is contingent upon the Member Agency having paid dues in full and honored its obligations under these Terms and Conditions. All disbursed checks not cashed after the second delivery attempt will remain the property of Community Shares.

Associate Member Agency Benefits

Community Shares offers limited information and benefits to Associate Member Agencies. These may include, but are not limited to:

- Newsletters, special pricing, and shared information by other members or by interested third-party organizations
- Access to four free professional development sessions per year; additional services may be available at discounted rates.
- Access to roundtable discussions to network with fellow members, exchange ideas, and problem-solve.

Termination of Membership

Termination for Convenience

A Member Agency may terminate its membership with Community Shares at its convenience, for any reason or no reason, by providing fourteen (14) days' written notice to Community Shares.

Community Shares may terminate the membership of any Membership Agency at Community Shares' convenience, for any reason or no reason, by providing fourteen (14) days' written notice to the Member Agency.

Termination for Cause

Community Shares may terminate the membership of any Member Agency, effective immediately upon written notice to the Member Agency, if the Member Agency fails to pay its membership dues or violates any of these Terms and Conditions or any other Community Shares policy incorporated herein.

Community Shares will not refund any portion of the dues paid by a Member Agency prior to the termination of its membership under any circumstances and regardless of the reason for the termination.

Last reviewed: 08/19/2025

Next review date: 2028