


CommunityShares
Annual Recertification

Due Friday, February 3rd



Overview

New Format

- Recertification Packet
- Recertification User Guide

Recertification Packet Outline

Section 1: General Forms to Complete Including Required Signatures

Section 2: Statement of Local Presence and CFC Application

Section 3: Required Attachments



Recertification Purpose

Allows us to apply on your behalf to the combined campaigns and inclusion in private campaigns:

- Combined Federal Campaign
 - 5 Colorado Regions - federal and military employees
- Denver Employees Combined Campaign
 - City and County of Denver employees
- Colorado Combined Campaign
 - State of Colorado employees

Note: Combined Campaigns account for 40% - 60% of the campaign total each year.

Recertification Purpose



- Renews your membership with Community Shares
- Verifies your good standing as a nonprofit in this community
- Helps us tell your mission, accomplishments and outcomes comprehensively


Deadline

- Friday, February 3, 2012 no later than 5:00 p.m.
- Early bird due date of Friday, January 27, 2012 for 3 bonus participation units.
- Late materials: A fine of \$25 per business day (not to exceed \$250.00) will accrue until all documents are received.

Section 1: General Forms and
Required Signatures

Membership Renewal Application
page 3





Community Shares
2012 COMMUNITY SHARES OF COLORADO
MEMBERSHIP RENEWAL APPLICATION

Legal Name of Organization: **Organization Name**

DBA (if applicable): **DBA**

How would you like your organization name listed on Community Shares promotional materials?: **Include Acronym? Abbreviated from legal name?**

EIN: **EIN**

Membership Renewal Application
page 3

Legal Name of Organization vs. DBA Name

- Legal Name will be used for IRS verification – be sure it's complete. You can find it on your IRS verification letter.
- If you have a DBA Name, you must submit verifying paperwork that you are legally eligible to operate under that DBA Name
- How would you like your name to appear on Community Shares promotional materials?


Membership Renewal Application
page 3

25-Word Description

- Used for paper brochure and online directories for both combined & private campaigns
- What you do best and why they should support you
- Don't have to use complete sentences
- Use action language
- Connect the potential donor with the effect their donation will have on the clients you serve
- No "creative hyphenations," italics or capitalizations, per the CFC
- Your name and contact info will be listed just above your 25-word description. Do not include in your 25-word description.

Community Shares of Colorado Recertification Training 2012

CSC Membership Agreement
page 4



2012 COMMUNITY SHARES OF COLORADO
MEMBERSHIP AGREEMENT

Per Community Shares of Colorado Membership Policies, for the period of
January 1, 2012 to December 31, 2012

Agrees to: [Agency Name]

- Pay annual dues on or before given deadline.
- Designate a primary contact person for Community Shares.

- Membership Policies available at <http://www.cshares.org/forms>
- Type in agency name at top
- Affirm membership status and acknowledge awareness of participation requirements
- ED or CEO must sign & date

Membership Participation Report
page 5



2011 MEMBERSHIP PARTICIPATION REPORT

[Agency Name]

Recertification

- Perfect 2011 Recertification Application - 5 units
- Early bird 2011 Recertification Application - 3 units

Promotion of Community Giving

- Face-to-face meeting with CSC to open private workplace giving campaign - 3 units
- Community Shares spoke at your BOD meeting about our partnership - 3 units

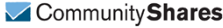
Date of BOD meeting: _____

- Posts to My Colorado - .5/per post

- Members asked to complete 15 participation units.
- Participation is focused on making your membership successful - marketing your nonprofit, current campaign, and opening new campaigns.

Excellence Standards
page 6-7

- Part of 2010 Strategic Vision created Member Excellence Standards to encourage members to:
 - Increase focus on governance
 - Use of technology
 - Communication with constituents
 - Staff talent retention
- Use results to:
 - Choose topic areas for free trainings
 - Report to funders
 - Track changes



2012 MEMBERSHIP EXCELLENCE STANDARDS

In an effort to limit the amount of time each agency must spend on written material, Community Shares removed the narrative portions of this document.

[Agency Name]

ORGANIZATION INFORMATION: _____

TECHNOLOGY
Check the boxes of technology organization currently utilizes:

CCC and DECC Memorandum of Compliance
page 8 - 9

- INITIAL all boxes – do NOT check them!
- Read all statements to ensure you are not misrepresenting your organization
- Sign & Date (signature of same person who initialed)


Nondiscrimination Policy for DECC
page 10

- Certify organization's policies meet the nondiscrimination standard of Denver Municipal Code.
- Read, verify your policy includes, sign, and date.

Section 2: Statement of Local Presence and
CFC Application

Community Shares of Colorado Recertification Training 2012

Statement of Local Presence
page 11



Statement of Local Presence/Attachment A

The Statement of Local Presence is an important part of your application and is used by the CFC, CCC and DECC combined campaigns to determine your eligibility. answer the questions completely.

Name of Organization: **Project Angel Heart**

Date of application: **08/20/11**

Street Address (Cannot be a P.O. Box):
10101 17th

- Critical document reviewed by campaign auditors to determine eligibility
- If application denied by the combined campaigns due to Statement of Local Presence, edits are not allowed during the appeals process.
- Referred to as Statement of Local Presence for private campaign DECC and CCC
- Referred to as Attachment A for CFC

Statement of Local Presence
page 11

- Detailed description of activities, programs and services rendered in calendar year 2011
- Qualitative data and specific accomplishment for 2011 (not goals for the future, etc)
- Clearly explain who benefits and how the programming positively impacts human welfare
- You may not submit a brochure or other pre-printed publications in lieu of this document
- See the Statement of Local Presence example by Project Angel Heart at www.cshares.org/recertification

Statement of Local Presence
page 11

Geographic Area – counties you serve and number or percentage of clients/customers served in those counties in 2011.

- 1-800 numbers and web resources do not meet the standard of geographic presence

Describe the geographic area where your programs are delivered. This should include specific counties and actual delivery of services. This does not include areas only receiving service via a website or 800 number unless users can be tracked by county via web usage reports.

Project Angel Heart delivers to clients who live in greater Colorado Springs and all across metro-Denver (within the boundaries of the E-470/C-470 corridor). We are also able to accommodate clients who live outside of our service boundaries but can arrange to either pick up their meals from our facility or from a friend or family member who does live within our service boundaries. The following chart shows county-by-county client distribution, with every county we serve accounted for.

County	# of Clients Served in 2009	# of Meals Served in 2009	% of Total Program
Adams	195	43,496	10.6%
Arapahoe	245	54,470	13.3%
Boulder	15	3,620	.88%
Denver	833	185,430	45.2%
Douglas	3	666	.16%
El Paso	310	68,927	16.8%
Jefferson	534	117,408	28.8%

Statement of Local Presence
page 11

Program and Services
INCORRECT: "All Coloradans benefit from the improved air of the trees we plant."

CORRECT: "We partnered with 4,200 individuals and 52 businesses to plant 10,600 trees in 2011. 65% of the trees planted were located in public parks and greenbelts in Denver County. We partnered with families and neighborhood associations to plant an additional 840 trees at private residences with household incomes below 50% of the county's median average income."

Statement of Local Presence
page 11

Attention:
Arts, Animal Welfare, Environmental, and Social Justice Groups

- Your programs, services and benefits affect human health and welfare.
- Focus on the human benefits received from your work. This might mean using slightly different language than you typically use.
- Remember, this document is not a publicity piece and is only viewed by auditors. They simply aim to verify that you have a substantial presence in the community providing benefits to human health and welfare.

Statement of Local Presence
page 11

Animal Welfare Example
Cat Care Society

- "... programs that are offered benefit both cats and the general public... families that adopt a cat, senior citizens who benefit from the Purina Pets for Seniors Program, nursing home visitation program, and low-income cat owners that utilize our clinic."
- They note how each service has human benefits. Through humane education they "prevent abusive behavior, unplanned feline propagation, decrease abandoned/neglected pets, and increase adoption to loving homes." Their Temporary Care Program is an "option for cat owners who are homeless, hospitalized or in safe houses." The vet clinic services "qualifying low-income families."

Statement of Local Presence
page 11

Environmental Examples

Trails & Open Space Coalition

- "... open space efforts help preserve wildlife and their habitat, agricultural land, scenic vistas, geological foundations and important cultural and historical features... Our trails and bikeway efforts provide outlets for recreation and commuting. These activities provide direct health benefits through easily available, inexpensive and accessible facilities... We continue to combat the rising obesity rates... By providing free and easily available access to trails, parks and open space..."


Statement of Local Presence
page 11

Arts Example

Colorado Public Radio

- "... (name of programs) has been embraced by listeners across the state because its content enriches their lives... (programs) provides in-depth, unbiased coverage of local, national and international issues, helping listeners understand the impact of these issues on their daily lives, family, businesses and community... For generations, music has been a source of inspiration and comfort."

Combined Federal Campaign Application



**COMBINED FEDERAL CAMPAIGN
2012 APPLICATION FOR LOCAL INDEPENDENT
ORGANIZATIONS AND MEMBERS OF FEDERATIONS**

Organization: _____

Employer Identification Number (EIN): ____-____-____

5 Digit CFC Number (If a previous participant in the CFC): _____

Organization Address: _____

(Post Office Box addresses are not accepted and may result in automatic disqualification.)

Check this box if the above address is different from the address submitted with the 2011 CFC application:

Telephone: (____) _____

Contact Person: _____

Contact Title: _____

Combined Federal Campaign Application

Do you qualify for the CFC?

Some reasons you may not include:

- Your annual budget was \$100,000 or more and you didn't have an audit
- You use a Cash accounting system instead of an Accrual accounting system
- Your National parent organization applies on your behalf to the CFC Nationally

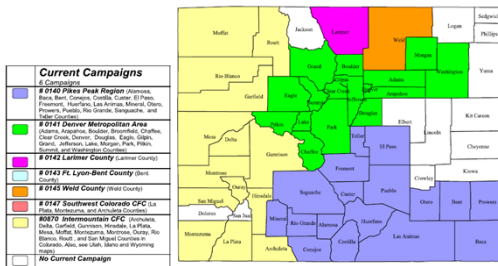
Combined Federal Campaign Application

Question 1

- The two copies of Question 1 are used to apply on your behalf to all of the CFC regions – this increases your outreach
 - One copy with box 1 checked for the **Local** CFC region (page 13)
 - One copy with box 2 checked for the four **Adjacent** CFC regions (page 14)

Combined Federal Campaign Application

Colorado



Last Updated February 2011

Combined Federal Campaign Application

Question 1

Statewide Presence

- Requirements for Statewide Presence
 1. 30% state-wide geographic service delivery area
 2. 30% of the state population must be served
- Many nonprofits find they do not meet these criteria
- We apply on your behalf to the adjacent federal campaigns.

Combined Federal Campaign Application

Question 2

- The IRS Verification letter we submit on your behalf must be dated January 1, 2008 or more recent

Question 3

- Group Exemption only applies to those agencies that are local affiliates of National organizations.
- Most CSC members will check the first box indicating they are not part of a group exemption.

Combined Federal Campaign Application

Question 4

- This box is checked for you!
- Remember, all Community Shares member nonprofits provide services that affect human health and welfare.
- Every member nonprofit must have this box checked!

Combined Federal Campaign Application

Question 5

- Although the CFC does not require that you physically submit your audit if your annual budget is between \$100,000 and \$250,000, they do require that you have one.
- Therefore, Community Shares requires that you submit a copy of your audit if you have an annual budget of \$100,000 or more.

Combined Federal Campaign Application

Question 5, continued

- Financial statements must be the same fiscal year as IRS 900. The audit and 900 must reconcile.
- Your legal name and EIN must match your IRS Determination Letter or DBA Documentation
- The CPA report must be on company letterhead, the auditor must sign it and indicate if GAAP or GAAS was methods were used.

Combined Federal Campaign Application

Question 6

- Certify your organization prepares and submits complete 990 to the IRS.
- Reference page 13 of User Guide for specific requirements of the CFC 990 Pro Forma

Combined Federal Campaign Application

Question 7

- Administrative Fundraising percentage must be calculated, per CFC regulations.
 - Add the amount in Park IX (Statement of Functional Expenses), Line 25, Column C (Management & General Expenses) to the amount in Lind 25, Column D (Fundraising Expenses), and divide the sum by Park VIII (Statement of Revenue), Line 12, Column A (Total Revenue)
- __. __%
- See 13 of CSC Recertification User Guide

Combined Federal Campaign Application

Question 8 - 12

These are all self-explanatory check boxes. Please contact me if you have questions regarding these items.

Combined Federal Campaign Application

Question 13

Attachment E, Page 18

- Taxonomy Codes are found on page 18. Keep in mind what your acronym of taxonomy codes spells.
- Select and list them in the order of relevance to your organization.

you me us us me us me me us us me you me
me you us us me us you me you me
me me you you me me me you
Combined Federal Campaign Application

CFC Note:

- Applications for the CFC are reviewed by a panel of Federal employees that **volunteer** called the LFCC.
- The LFCC determines the eligibility of each applying charity based on set criteria.
- All LFCC members and managing staff of CFC regions are focused on creating the most level playing field for charities.
- **IMPORTANT:** Should your application be denied by the combined campaigns, edits are not allowed during the appeals process. Please be thoughtful in your answers!

you me us us me us me me us us me you me
me you us us me us you me you me
me me you you me me me you
Combined Federal Campaign Application

Common errors:

- Submitted 990s with no officer signature, missing attachments or statements.
- Attachment A is without specific numbers and counties.
- Not submitting second copy of Question 1 to be eligible for adjacent CFC regions.
- Submitted without all boxes being checked.



Section 3: Required Attachments

Required Attachments

Current Budget and Board Minutes

- Submit a copy of the budget your organization is currently operating with.
- Submit a copy of the minutes indicating the board of directors has approved this budget.

Required Attachments

IRS 990

- Dated June 30, 2010 or more recent
- Must be signed by an officer in the appropriate spot. For e-file, print out the signature sheet and have an officer sign it.
- Make sure it includes all attachments and statements.
- Board of directors must be listed and indicate zero compensation.

Required Attachments

Financial Statements

- must cover the same period as your IRS 990
- Dated June 30, 2010 or more current
- Audit, financial review or financial statements that include income and expense
- Signed by auditor on letterhead
- Cover letters must indicate GAAS or GAAP
- DBA? Verify name match between IRS Determination Letter and audit

Required Attachments

Board of Directors

- Current 2011-2012
- Names, terms, city/state of residence and business of employment
- If your board list doesn't include the address information, create a new document that does

Required Attachments

IRS Determination Letter

- Dated within the last five years
- DBA Documentation provided if variation from name as listed on Determination Letter compared to 990, Financial Statements, or application

Required Attachments

Annual Report

- Must cover same period of time as your Financial Statements and your IRS 990 - dated June 30, 2010 or more recent
- If your Annual Report does not have all the required information, create a document with the missing information as an addendum.

Required Attachments

Annual Report

Requirements

- Full description of activities and supporting services
- Types/methods of solicitation for contributions
- Names of chief administrative personnel
- Names and addresses of all board of directors
- Full disclosure of the sources and uses of contributions, total revenue, administrative expenses, fund-raising expense and total expenses
- Percentage of total expenses not used for direct services
- Total budget

Additional Information

Certificate of Good Standing & Charitable Solicitations Renewal Number

- Community Shares will verify and collect on your behalf.
- We will notify you if your organization is not current or in good standing.

Additional Information

Due Date:

- Complete Packets must be in the CSC office **Friday, February 3rd by 5:00 p.m.** Packets received after that time and date will be considered late.
- Members turning in late Packets will accrue a \$25.00 per business day late fee (not to exceed \$250.00).

Additional Information

Early Bird: Complete Packets submitted by Friday, January 27th, by 5:00 p.m.

- Members who turn in their complete packet by the Early Bird Due Date receive 3 participation

Perfect Packet: Submit a perfect packet by Friday, February 3rd, by 5:00 p.m.

- Members who turn in their perfect packet by the deadline will receive 5 participation units

Additional Information

What is a Complete Packet?

- A Complete Packet must show a good faith effort by the member agency to be complete and accurate.
- Members submitting Incomplete Packets will accrue the \$25.00 per business day late fee until their packet is complete.
- Community Shares staff will determine whether or not a good faith effort has been made in the case of Incomplete Packets.

RESOURCES

<http://www.cshares.org/recertification>

- Recertification Packet
- Recertification User Guide
- Samples and Guidelines for Attachment A

Community Shares Office
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303.861.7507
