



**Many People. Many Dreams. One Community.**

612 West Main Street, Suite 200, Madison, WI 53703 **phone** 608-256-1066  
**e-mail** [csw@communityshares.com](mailto:csw@communityshares.com) **web** [www.communityshares.com](http://www.communityshares.com)

June 16, 2014

Dear Friend,

At its May board meeting the Community Shares of Wisconsin (CSW) Board of Directors approved a plan to expand membership by adding up to 20 new member nonprofits in 2014. The decision supports Community Shares core value of inclusiveness and commitment to increasing financial support to local grassroots organizations working for systemic social change.

I am writing to provide you with specifics for this year's process and invite you to consider applying for membership in Community Shares of Wisconsin. We plan to welcome new members in November 2014 and these new members will join our 60 current member nonprofits in fundraising campaigns starting in 2015.

Potential members must be committed to challenging injustices by addressing critical issues and support 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 people 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 and human environments and their sustainability.

CSW is especially interested in organizations that focus their work on one or more of these areas: racial and ethnic disparities, innovative strategies aimed at increasing educational equality and attainment, food security, environmental justice, increasing economic equality, reducing discrimination, civic engagement and grassroots organizing—to provide people with the tools to act together to create change on a systemic level.

Potential members must also decide if they are comfortable with CSW. When the CSW membership committee reviews potential members they look at the integrity of the organization and the applicant's commitment to work with all our members.

The membership application process has three components. First is the initial short application form (a copy is enclosed with this letter), **due on August 1, 2014**. Following a review of applications, eligible organizations will be asked to complete a more in-depth application providing additional information and materials. The secondary phase applications will be mailed/emailed to selected organizations in August and will be due to Community Shares of Wisconsin on **October 6, 2014**.

For the final step in the membership process, the membership committee will conduct interviews with selected organizations. Interviews will be conducted in October and November. Each organization will be requested to send an officer of their board of directors along with key staff or volunteers for the interview.

The CSW Board of Directors is expected to give final approval to new members at the November 2014 board meeting. New member agencies will participate in fall private fundraising campaigns and other cooperative fundraising activities in 2015. If eligible, new member groups will participate in public fundraising campaigns starting in 2016. New members will receive 100% of their designations (gifts directed to them) from those campaigns starting in 2016 and 2017. New members will receive 25% of their “share” in 2016, 50% in 2017, 75% in 2018, and a full share in 2019. (Note: the share is funded from undesignated donations received by CSW, which is then allocated to all members.) New members will be expected to pay membership dues in 2015; dues are expected to be \$500. In addition members will be expected to contribute “work hours” through board and committee participation, orientation sessions, and other activities. The work hour range is currently 25-45 hours per year, per member organization. New members should expect to provide no more than 25 hours in their first year as a CSW member.

If your organization is interested in becoming a member of Community Shares of Wisconsin and you meet the basic membership requirements outlined in the membership criteria and application check list, please complete the enclosed application form and checklist. **Submit three copies of the application, one copy of the checklist, as well as a brochure, annual report or newsletter from your organization. Deadline is August 1, 2014.** The application form is available online at [www.communityshares.com](http://www.communityshares.com) but forms and attachments must still be mailed to Community Shares. Please call us with any questions you may have regarding meeting the membership requirements or any part of our membership selection process.

Sincerely,



Crystel Anders  
Executive Director



Emily Winecke  
Membership Coordinator

Enclosures: Initial application form  
Organization checklist  
Membership criteria and obligations  
SECC eligibility (Administrative Code 30) checklist  
CSW nondiscrimination policy  
CSW mission and current membership list

## Community Shares of Wisconsin Initial Application Form for Membership

**Please complete and return three copies of this application to Community Shares of Wisconsin, 612 West Main Street, Suite 200, Madison, Wisconsin 53703 by August 1, 2014.** Keep responses to the space provided in this application. Application is also available online at [www.communityshares.com](http://www.communityshares.com). Please call Emily Winecke or Crystel Anders at (608) 256-1066 with any questions.

Name of Organization:

Address:

City/State/Zip Code:

Phone:

FAX:

Email:

Website:

Contact Person/Title:

Annual Operating Budget:

Number of paid staff:

Number of volunteer staff:

1. Provide a brief description of the organization including its mission and its commitment to challenging injustices and supporting social change.

2. Describe your organization's ability to meet all the **obligations of membership** (see enclosed Criteria, Section II)

3. Please indicate the length of time your organization has been in existence and list your current major sources of revenue by category below

Current Revenue Sources by Category

\_\_\_\_% public/governmental grants      \_\_\_\_% private grants

\_\_\_\_% local fundraising      \_\_\_\_% dues and fees      \_\_\_\_% other (please list)

Please list your major funding sources:

Have these sources changed in the last 18 months?

\_\_\_\_No \_\_\_\_Yes (please explain)

4. Why is your organization interested in joining Community Shares of Wisconsin? What are the most important things you will gain with membership? What will you bring to Community Shares that will strengthen CSW and our commitment to social justice?

## Organization Checklist

Complete the following checklist and submit **one copy** of the checklist **and attach one brochure, annual report and/or newsletter that describes your organization's work.**

	QUESTION	YES	NO	IN PROCESS/COMMENTS
1.	Does your organization maintain a 501 (c)(3) tax-exempt status?			
2.	Is your organization currently registered with the State of Wisconsin Department of Financial Institutions (DFI) as a charitable organization?			
3.	Does your organization serve residents of south central Wisconsin?			
4.	Is your organization currently a member of any other local, statewide or national federation?			
5.	Is your organization independently managed? (i.e., There are no controls on policies or operations from a parent or affiliate organization.)			
6.	Does your organization operate with a volunteer board of directors who serve without compensation?			
7.	Has your board of directors and/or key volunteers approved your application to CSW?			
8.	Has your organization been incorporated for more than one year? How long?			
9.	Does your organization operate under accounting and financial systems that are based on generally accepted accounting principles?			
10.	Does your organization conduct an annual, independent financial review?			
11.	Based on the included SECC eligibility reference checklist, would your organization currently be eligible to participate in public campaigns? (Note: answering "no" to this question is not necessarily a barrier to membership in CSW, but please explain in the comments section.)			
12.	Is your organization able and willing to fully participate in CSW including serving on the board of directors, committing volunteer work hours for committees and special projects, networking with other CSW agencies, and paying membership dues?			
13.	Is your organization willing to adhere to the CSW nondiscrimination policy (enclosed)?			

# Criteria for Community Shares of Wisconsin Membership

## I. MEMBERSHIP CONDITIONS

Each applicant must meet the following conditions:

- A. Receive the approval from its board of directors prior to submitting application for membership in CSW.
- B. 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 people 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; and
  - Promote respect for the natural and human environments and their sustainability.
- C. No member agency shall, either through its organizational goals or corporate action, malign, publicly criticize or otherwise seek adversely to affect the programs, services or fundraising practices of any other member agency.
- D. Qualify as an exempt organization under Section 501(c)(3) of the Internal Revenue Code.
- E. Be registered with the Wisconsin Department of Financial Institutions as a charitable organization.
- F. Have a demonstrated base of support from individuals and the community at-large including financial, in-kind and volunteer.
- G. Make decisions about the use of funds received from CSW independent of any national parent organization, or otherwise demonstrate that funds received from CSW will be used in support of program services in Wisconsin.
- H. 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.
- I. Have been incorporated for at least one (1) year prior to membership application.
- J. Adhere to the CSW nondiscrimination policy.
- K. Not inhibit or prohibit employees from organizing a union.
- L. Have an office located and headquartered in Wisconsin.

## **II. MEMBERSHIP OBLIGATIONS**

**Each organizational member shall meet the following obligations:**

- A. Adhere to policies and obligations of CSW.
- B. Submit a statement that funds received from CSW will be used for the organization's stated purposes.
- C. Provide CSW staff with copies of Articles of Incorporation, IRS Status, bylaws, and necessary annual documentation as required to participate in payroll deduction campaigns.
- D. Meet requirements of ADM 30.05, Wis. Administrative Code for participation in the state payroll deduction campaign, the State Employees Combined Campaign (SECC). [Administrative Code checklist is attached]
- E. Provide financial support to CSW through membership dues and administrative assessments determined annually.
- F. Participate in periodic review to assure compliance with CSW bylaws.
- G. Provide the annual number of work hours as established by the CSW board of directors.
- H. Designate an individual to serve on the CSW board of directors and to act as liaison between CSW and the member organization.
- I. Assure that a representative from the organization shall be an active member of at least one (1) CSW committee.
- J. Participate in CSW co-marketing projects and promote CSW giving campaigns online and in print.

# 2014 State Employees Combined Campaign (SECC) Eligibility Checklist

SECC Eligibility/Membership File Update for  
(Organization Name): \_\_\_\_\_

*[The numbered items in the table below are based on numbering in the 2014 Wisconsin State Employees Combined Campaign Charitable and Umbrella Organization Certification form. This is provided as an example for potential nonprofits to understand the eligibility process involved in taking part in CSW public campaigns. Documents are generally required by early January of the campaign year. Dates, deadlines, and required items may vary from year-to-year]*

<i>Required Item</i>
<b>1. Copy of IRS ruling</b>
<b>2. Registration as a “charitable organization” with the WI Dept of Financial Institutions (DFI) (formerly housed by Dept of Reg &amp; Licensing) <u>for the most recent audited financial statements for FY12 or later or letter of exemption</u></b> <ul style="list-style-type: none"> <li>• Form #1952 (for most organizations)</li> <li>• This is a <u>TWO</u> page form</li> <li>• Make sure second page is signed if possible</li> </ul>
<b>3. Signed copy of policy and board minutes certifying that funds contributed to the organization through the Wisconsin SECC shall be used for the announced purposes of the organization.</b>
<b>4. GAAP audit for the most recent audited financial statements for FY12 or later</b>
<b>5. 2014 operating budget and copy of board minutes where 2014 budget was approved</b>
<b>6. Signed copy of policy and board minutes certifying that the organization’s fundraising practices include the safeguards outlined in Section 30.05(10) of Wisconsin’s Administrative Code</b>
<b>7. Signed copy of policy and board minutes certifying that the organization has a board-approved policy and procedure of nondiscrimination.</b>
8. <u>Two</u> copies of the <b>2012 or later annual report</b> which meets requirements listed on certification form. “An annual report...which includes...”: <ul style="list-style-type: none"> <li>• A full description of the charity’s activities.</li> <li>• The types of solicitation for contributions are described.</li> <li>• Names of chief administrative personnel.</li> <li>• Full disclosure of the source and use of contributions.</li> <li>• Assurance that copies of the most recent annual report are available to the public.</li> </ul>
<b>9. List of all personnel earning in excess of \$20,000 per year. (List individuals, their salaries and positions). If there are no such employees, please include a statement indicating that.</b>
Initialed and signed copy of the 2014 WI SECC Charitable and Umbrella Organization <b>Certification Form</b> (Umbrella = Community Shares of Wisconsin.)
Current <b>bylaws</b> , if changed since January 2013

<i>Required Item</i>
<b><i>IRS 990 for the most recent audited financial statements for FY12 or later*</i></b>
<p>Current <b>board list</b> including all of the items listed below.*</p> <ul style="list-style-type: none"> <li>• Names and addresses of board members</li> <li>• Places of employment – please provide PLACES of employment, not occupations or professions. This is helpful in our efforts to increase fundraising through campaign development and access work.</li> </ul>

***\* IRS 990 and board list are requested primarily because they are needed for eligibility in the Combined Federal Campaign (CFC).***

## **CSW Nondiscrimination Policy**

It shall be the policy of CSW not to discriminate in regard to age, ancestry, color, creed, disability, national origin, race, religion, sex, sexual orientation, gender identity and expression, or any other class protected by applicable state or federal laws. This policy shall apply to persons served by CSW and its member agencies, to the employment practices of CSW and its member agencies, and to membership on the CSW governing board and its member agencies. Further, CSW shall actively seek to include on its staff and Board of Directors persons from the principal minority groups present in the areas served by CSW, and members of all genders.

## **CSW Mission Statement and Current Membership List**

### **Mission Statement**

Community Shares of Wisconsin (CSW)—together with its donors and member nonprofits—addresses social, economic, and environmental problems through grassroots activities, advocacy, research, and public education.

CSW represents: Many people, many dreams, one community.

### **2014 CSW Member Organizations**

1000 Friends of Wisconsin  
ABC for Health  
ACLU of Wisconsin Foundation  
Arts Wisconsin  
Bayview Foundation  
Center for Family Policy and Practice  
Center for Media and Democracy  
Chrysalis  
Citizens for Safe Water Around Badger (CSWAB)  
Citizens Utility Board  
Clean Wisconsin  
Common Wealth Development  
Community GroundWorks  
Dane County TimeBank  
Disability Rights Wisconsin  
End Domestic Abuse Wisconsin  
Fair Housing Center of Greater Madison  
Fair Wisconsin Education Fund  
Freedom Inc.  
Friends of Wisconsin State Parks  
Gathering Waters Conservancy  
Gay Straight Alliance (GSAFE) for Safe Schools  
Grassroots Empowerment Project  
Housing Initiatives  
Interfaith Coalition for Worker Justice of South Central Wisconsin  
League of Women Voters of Wisconsin Education Network  
Legal Action of Wisconsin  
Madison Area Community Land Trust  
Madison Audubon Society  
Midwest Environmental Advocates  
NARAL Pro-Choice Wisconsin Foundation  
New Harvest Foundation  
Nuestro Mundo Inc.  
OutReach  
Outside the Bean (formerly Community Action on Latin America)  
Physicians for Social Responsibility-Wisconsin  
The Progressive  
Project Home  
Rape Crisis Center  
REAP Food Group  
River Alliance of Wisconsin

Sierra Club Foundation, John Muir Chapter  
Sustain Dane  
Tenant Resource Center  
UNIDOS Against Domestic Violence  
Wheels for Winners  
Wisconsin Coalition Against Sexual Assault  
Wisconsin Council of the Blind and Visually Impaired  
Wisconsin Council on Children and Families  
Wisconsin Democracy Campaign  
Wisconsin Early Childhood Association  
Wisconsin Family Ties  
Wisconsin League of Conservation Voters Institute  
Wisconsin Literacy  
Wisconsin Network for Peace and Justice  
Wisconsin Wetlands Association  
Wisconsin Women's Network  
Women in Transition  
Working Capital for Community Needs  
WORT 89.9 FM Community Radio