Standards Self-Study Work Sheet

Questions
Narrative
Action Plan
Dear Friends,

This self-study worksheet was developed to assist you as you and the other community volunteers who make up your local team examine your local prostate cancer activities. This is envisioned as a work tool for you to share with the home office to meet the Standards and identify your plans, priorities and needs. As you fill it out and answer the questions, discuss and reflect on how we can team together to better help those dealing with prostate cancer.

By now, you may have had the opportunity to review the Standards and the Teaming Agreement. As you may recall, in the Standards information, we shared the following:

*We are excited that you have decided to commit your time and energy to starting and running a group in your area to address the issues of prostate cancer. All groups that work with Us TOO International commit to:*

1) conducting a local community support group,
2) supporting Us TOO’s Mission:
   - Be the leading prostate cancer organization helping men and their families make informed decisions about prostate cancer detection and treatment through support, education and advocacy,
3) meeting the Standards and
4) signing the Us TOO “Teaming Agreement”.

We also stated that the Us TOO Corporate By-laws call for “…the development and nurturing of local support groups as a vehicle for programs to educate and support those diagnosed with prostate cancer, as well as their families/significant others, including those at risk.”

Today, Us TOO has more than 325 local community groups with which we associate, affiliate and collaborate. Us TOO’s corporate or “home” office volunteers, consultants and staff function as a resource center and act to facilitate local activities and success.

**Policy**

The Board of Directors of Us TOO has developed new policy which we have included below to guide us in this area.

*Us TOO Policy Draft June, 2011:*

*Us TOO Chapter/Support Group Standards and Teaming Agreement:*

**Us TOO has developed Standards and a Teaming Agreement for groups affiliated with Us TOO. It is policy that all groups affiliated with Us TOO will move to meet the requirements of the Standards and will sign the Teaming Agreement. Us TOO home office representatives will move in a tiered fashion to contact all existing affiliated groups.**

*It is Us TOO’s policy that all groups will meet these Standards. Us TOO will*
have each new group seeking affiliation with Us TOO and all existing groups conduct a self-study to determine its level of compliance with the Standards and demonstrate to Us TOO’s home office their level of compliance. In areas where full compliance does not exist, the group will state its plan and timing for correction.

The self study materials will be reviewed by Us TOO’s home office and all groups meeting the Standards will be deemed to be “in good standing” for a period of 3 years. All groups “in good standing” will receive a charter indicating their agreement to participate in the fulfillment of the Us TOO Mission.

Groups not achieving compliance, failing to develop a plan of correction or non-responsive, will be placed in a “not-in-good standing” category. The home office will contact the groups a minimum of three times (via email, letter and telephone) to engage the group in the process of meeting the Standards and signing the Teaming Agreement.

Groups not meeting the Standards and failing to sign the Teaming Agreement will be disaffiliated and no longer enjoy the benefits of affiliation. Groups may appeal the decisions at any point in writing and the Us TOO home office will review the appeal in a timely manner not to exceed 60 days.

What type of group are we?

So, to help you move forward, here are the definitions we have developed to help you identify which category you want to use to define your group’s activities. Are you a support group or a chapter?

Support Groups focus on providing support group services and some community awareness activities. The groups usually do not handle money or fundraise, are usually unincorporated groups that do not have a Federal tax ID number and are not registered in their states.

Chapters are groups which provide support group services, multiple other services and work on fundraising projects. The groups often work closer and more collaboratively with Us TOO’s home office. They may or may not be incorporated as organizations, have Federal tax ID numbers and may or may not be registered in their states as tax exempt organizations.

Addressing the Us TOO Standards

The Us TOO Standards are listed in four distinct sections:

A) ORGANIZATION
B) COMMUNICATION
C) POLICY COMPLIANCE
D) PROGRAM AND ACCOUNTING REPORT

We have developed a set of 33 questions for you to use to discuss your status and action plan as needed.

Sincerely,
Us TOO Board of Directors
Fred Mills, Chairman and Kay Lowmaster, Vice Chairperson
SECTION A: ORGANIZATION

1. Core Support
   It is beneficial to have more than one person help organize and run your group. Us TOO believes that this will help prevent the problem of your group becoming “inactive” after a leader retires and will ultimately solve the problem of having one person do “all” of the work.

   **Self-Study Question #1:** Does your group have a core group of people?

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   ______________________________________________________

   **Self-Study Narrative and Action Plan as Needed:**
   ______________________________________________________
   ______________________________________________________

2. Basic Organization/Governance
   To assure that your group has a viable, functional organizational structure, Us TOO recommends, at minimum that your group creates a Steering Committee that would consist of a designated leader, an alternate leader and an advocacy contact (to be a point of contact locally on “hot” legislative or advocacy concerns). Us TOO asks all groups to create an organizational structure and share that with the home office. Us TOO now encourages all new groups to work with the home office utilizing the one Us TOO not-for-profit corporate structure.

   **Self-Study Question #2:** What is your group’s organizational structure?

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   ______________________________________________________

   **Self-Study Narrative and Action Plan as Needed:**
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SECTION A: ORGANIZATION (CONTINUED)

3. Community Sponsorship
   Each group is encouraged to locate, negotiate and maintain a relationship with a local organizational “sponsor” (such as a health care organization or hospital to help as a host) to provide no-cost meeting facilities and other support. It is suggested that a simple letter of agreement be developed to outline the relationship between the sponsor and your group.

Self-Study Questions 3: Do you have a “sponsor” or host for your group?
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Self-Study Questions 4: Do you have a letter of agreement? If so, please describe and share a copy.
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Self-Study Narrative and Action Plan as Needed:
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SECTION B: COMMUNICATION

1. Contact Information
   It is essential that each group provides up-to-date information for the Us TOO website, and to facilitate referrals to your group from the Us TOO 800 Helpline. This information should be updated for the home office at least annually.

Self-Study Question #5: Have you shared the latest contact information for your group with the home office?
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Self-Study Narrative and Action Plan as Needed:
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SECTION B: COMMUNICATION (CONTINUED)

2. Mailing List
Each group agrees to develop and maintain a mailing list to facilitate the most effective and accurate communication possible. The list should be used in collaboration with the home office. The mailing list should not be provided to any organization for sales or solicitation purposes.

Self-Study Question #6: Do you have a mailing list?

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Self-Study Question #7: Do you assure you do not share the mailing list for sales or solicitation purposes with any organization?

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Self-Study Narrative and Action Plan as Needed:

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SECTION C: POLICY COMPLIANCE

1. Non-Endorsement
Leaders and participants agree to follow the Us TOO policy of not endorsing any specific company, product, service or medical provider.

Self-Study Question #8: Are you aware of and follow the policy of non-endorsement?

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Self-Study Narrative and Action Plan as Needed:

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...continued
SECTION C: POLICY COMPLIANCE (CONTINUED)

2. Logo and Us TOO International Name Usage

Leaders and participants agree to follow the Us TOO policy on Us TOO logo use, which says the correct and accurate Us TOO logo and Us TOO International name can be used by the group with prior approval from the home office. When used locally, the logo and Us TOO name should reflect your local group’s name. The group’s name should be approved by the home office and reflected on your group’s Us TOO Charter. Each local group can use the Us TOO name and logo on print materials including letterhead, newsletters, banners or websites following prior approval from the home office. The approved Us TOO support group or chapter logo developed for local group use should be used to identify your group to assure organizational branding and identification.

Self-Study Question #9: Do you use Us TOO’s logo and name after seeking home office approval?

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Self-Study Question #10: Do you use your group’s approved name found on your charter?

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Self-Study Question #11: Do you use a logo developed for you by the home office or have you developed a logo for your group?

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Self-Study Narrative and Action Plan as Needed:

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...continued
SECTION D: PROGRAM & ACCOUNTING REPORT

1. Program Reporting
   Program activities reporting should be done annually. All groups working with Us TOO agree to do, at minimum an on-going support group and many groups are active on the program front with additional activities such as programming for family members such as women, special populations such as African Americans or awareness and outreach projects. It has become the mark of outstanding organizations to make the public aware of what a group does and the results and impact of donors’ support for the organization. Program reporting will assure a more complete picture of what Us TOO and the groups working with the home office do and accomplish.

Self-Study Question #12: Do you create an annual report of your group’s activities?
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Self-Study Question #13: If so, do you share that with the home office?
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Self-Study Question #14: Do you conduct a support group?
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Self-Study Question #15: Do you do other services as well?
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Self-Study Question #16: If so, please describe in your report.
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SECTION D: PROGRAM & ACCOUNTING REPORT (CONTINUED)

1. Program Reporting: (continued)

Self-Study Narrative and Action Plan as Needed:

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2. Financial Reporting

All group leaders agree to consult with the home office on all financial activity and report all financial activities of your group to the home office. Us TOO expects all groups to be aware of and conform to all state and local laws and regulations concerning sales tax reporting and payments. For the most part, local groups working with Us TOO are created as informal groups and are not incorporated or recognized as tax exempt organizations by the federal government or registered as not-for profit organizations in their states.

Your volunteers may choose to work in collaboration with the home office on raising funds for Us TOO and/or for your local group’s activities. It is expected that local groups share 25% of net (after expenses) fundraising funds raised with the Us TOO name with the home office. Unincorporated groups do not have the tax status to accept tax-deductible donations, to open bank accounts or to raise and handle money as they are not legal entities. Groups have the benefits of working with the home office to utilize Us TOO’s tax exempt status, accept gifts as tax-exempt donations and avoid the pitfalls of personal liability, taxes and/or potential fines.

As previously mentioned, in the past some local groups became incorporated tax-exempt and state registered not-for-profit organizations. Those groups who are incorporated need to take on the responsibility of completing their own tax forms and/or sharing their local bank account information with the home office. New groups however are encouraged to work with the Us TOO home office and conduct activities cooperatively and use the Us TOO corporate tax status.

Self-Study Question #17: Do you consult the home office on financial decisions and report at least annually on your financial information and status?

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...continued
SECTION D: PROGRAM & ACCOUNTING REPORT (CONTINUED)

2. Financial Reporting (continued)

Self-Study Question #18: How do you track and manage your group’s funds?

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Self-Study Question #19: Do you have a bank account?

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Self-Study Question #20: Do you have a set-aside fund at the home office?

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Self-Study Question #21: Are you aware of and in compliance with Federal, state and local laws pertaining to your group’s activities?

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Self-Study Question #22: Are you an informal or a formally incorporated group?

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Self-Study Question #23: Have you reported this status to the home office?

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Self-Study Question #24: If you are an incorporated group, what is your not-for-profit status at the Federal, state and local level?

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SECTION D: PROGRAM & ACCOUNTING REPORT (CONTINUED)

2. Financial Reporting (continued)

Self-Study Question #25: Have you filed tax forms and registrations as appropriate?

Self-Study Question #26: Do you raise money or seek donations?

Self-Study Question #27: If so, have you notified the home office and have you worked with the home office on this?

Self-Study Narrative and Action Plan as Needed:

3. Program Best Practices
   a. Medical Advice
      Leaders and participants agree to never give medical advice. Consistent with the Us TOO mission, local groups working with Us TOO provide information and support to help members make informed detection and treatment decisions. Local group volunteers are a link to helpful, reliable information and resources but are not sources of medical advice.
   b. Confidentiality
      Leaders and participants agree to respect the confidentiality of those who attend a meeting.

Self-Study Question #28: Do your leaders and participants agree not to provide medical advice?
SECTION D: PROGRAM & ACCOUNTING REPORT (CONTINUED)

3. Program Best Practices (continued)

Self-Study Question #29: How do you train your leaders and inform participants of this practice?


Self-Study Question #30: How do you monitor and control for this?


Self-Study Question #31: Do your leaders and participants agree to respect and maintain confidentiality?


Self-Study Question #32: How do you train your leaders and inform participants of this practice?


Self-Study Question #33: How do you monitor and control for this?


Self-Study Narrative and Action Plan as Needed:


THANK YOU VERY MUCH FOR THE WORK YOU HAVE DONE. PLEASE PROVIDE YOUR RESPONSES TO THE Us TOO HOME OFFICE SO WE CAN ASSESS YOUR NEEDS AND STATUS.