



PO Box 883, Helena, MT 59624

406-442-2218

[shares@montanashares.org](mailto:shares@montanashares.org); [www.montanashares.org](http://www.montanashares.org)

April 2017

## **MONTANA SHARES MEMBERSHIP APPLICATION PROCESS AND MATERIALS**

**Organizations interested in membership in Montana Shares shall submit to Montana Shares:**

- **Completed membership application**
- **All required documentation**
- **\$100 non-refundable application fee**

**Member application must be postmarked by 3/1/2018.**

**Member applicants must read the *Membership Policy*, paying particular attention to Parts one and two - *Criteria for Membership* and *Requirements of Participation for Member Organizations*.**

### **Membership process:**

1. Montana Shares Council or Executive Committee will review the application and materials.
2. After Council does the first review, all Montana Shares member groups will receive a summary of the application, along with notification as to when a presentation will be made and a vote taken on membership for the applicant. Applicant may be required to make a presentation and answer questions at this meeting.
3. If 80% of current members of Montana Shares approve the organization, the organization will be notified and given membership information. If the decision is to deny a group membership status, the group will be notified that membership has been denied.



**NEW MEMBERSHIP APPLICATION**

Date: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Legal name, if different: \_\_\_\_\_

Office physical address and phone number: \_\_\_\_\_

Mailing address if any: \_\_\_\_\_

Website: \_\_\_\_\_ General email: \_\_\_\_\_

Contact person's name, position and **signature**: \_\_\_\_\_

\_\_\_\_\_

Contact person's daytime phone number/email address: \_\_\_\_\_

Board president's name and **signature**: \_\_\_\_\_

Board president's daytime phone number/email address: \_\_\_\_\_

There are two parts to the application: the questions (I) and the documents (II).  
Please submit all answers electronically and any documents you wish may be submitted electronically.  
**Note, some require original signatures.** Please sign a paper copy, scan it and submit those electronically.

- I. Please answer the following questions as thoroughly and concisely as possible below or as a separate sheet.
1. Describe why your organization wants to join Montana Shares.
  
  2. Describe how your organization will fulfill the requirements of membership? Include what volunteer resources your organization has available to produce the expected work as detailed in the Membership information materials. If there are problems or concerns with regard to your organization meeting any of the minimum criteria for membership, please explain.
  
  3. Describe the ways your organization will enhance the fundraising capabilities of Montana Shares.

II. Please provide a copy of the following documents. If certain documents are not available, please explain.

- Your 501(c)(3) ruling (IRS determination letter)
- Current registration with Montana Secretary of State (printout from SOS website)
- Articles of incorporation and By-laws for your organization
- Statement of purpose/mission of your organization
- Policy/s of non-discrimination for **all** aspects of organization (staff, board, members, volunteers, leaders, etc.)
- Policy/s related to conflict of interests for staff and board
- Current annual budget
- Most recent IRS Form 990. **Officer's and preparer's signatures must be on form.**
- Most recent audit, financial review or compilation by an independent CPA, if you have one performed. Audit is required if total revenue on your 990 exceeded \$350,000.
- Montana Shares Financial Practices checklist (attached)
- Roster of your board of directors including mailing addresses, email address and their workplaces.
- Roster of your staff leadership/management, titles.

**Submit your completed Shares application and any documents you can [electronically](#).  
Also mail/deliver the completed and signed Shares application,  
all attachments and \$100 application fee to:**

**Montana Shares  
(hand deliver) 910 E Lyndale Ave, Suite E (downstairs)  
406.442.2218  
(or mail) P.O. Box 883  
Helena, MT 59624**

## DESCRIPTIONS OF YOUR ORGANIZATION FOR MONTANA SHARES MEMBERSHIP

Please fill in below, using extra space as necessary, or attach as a separate document.  
Please submit electronically to [bill@montanashares.org](mailto:bill@montanashares.org)

- 1) **25 word description:** Describe the program activities of your organization in 25 words or less for use in campaign materials. The description need not include the group name. It will be published in campaign materials along with the group's name, telephone number, and website. **THIS IS THE MOST IMPORTANT PART OF YOUR APPLICATION.** These 25 words will be the primary way to catch potential donor's interest. Examples are at [www.montanashares.org](http://www.montanashares.org) "member groups" tab.
  
- 2) **Impact Statement:** Describe the work of your organization. Explain in 2-3 short sentences 1) what the need is that your group is addressing and 2) what you are doing to remedy that issue. Be brief but as specific as you can, include numbers and tangible outcomes. Examples are at [www.montanashares.org](http://www.montanashares.org) "statements and stories" tab.
  
- 3) **What a pledge can buy:** Describe what a pledge can buy for your organization. Provide several examples of what a donation of varying amounts would be able to cover for your organization. Minimally one is needed; more is great. Examples are at [www.montanashares.org](http://www.montanashares.org) "workplace giving" tab.
  
- 4) **Compelling story for your organization.** This should be 3 minute compelling story – some real experience demonstrating in an inspiring way the impact your organization has in our communities and on the lives of our neighbors. If you can incorporate a human element and real example that's great. It is not just a summary of your mission or what you do. Examples are at [www.montanashares.org](http://www.montanashares.org) "statements and stories" tab.