

# Montana Shares

## Donor Name Use Policy

Montana Shares (Shares) and every organization that receives donations (Recipient) shall honor the basic goal of workplace giving: to ensure that employees are not overwhelmed with solicitations from charitable organizations. To honor this goal, donors pledging or contributing at their workplace shall not be individually solicited further.

- An individual may not be solicited for a period of 18 months from the time of his/her pledge, or approximately 1 year after member groups receive donor names. For example, Jane Doe made a pledge in the 2013/2014 campaign during the fall of 2013 for giving through the year of 2014. You received the person's name on the list in March 2014 with the information regarding the prohibition through about April 2015, which is when each group receives the next designation report. If that donor appears again on your designation list from the 2014/2015 campaign received by your group in April 2015, the prohibition continues.
- The only exception: An individual with whom the Recipient already has a relationship and who is now on your list as contributing through Shares may be asked to continue his/her prior manner of giving, with language that specifically honors the person's giving through Shares and recognizing he/she may wish to give only in this manner now.

For example, the person contributes membership dues or gives in some manner to the member before beginning to give through Shares, you can ask if the person wishes to continue to support your organization in this manner, recognizing and honoring that they have designated your group in the Shares giving campaign.)

- Individuals donating through Shares may **not** at anytime be solicited at their work addresses. This includes by phone, mail or email.
- Lists of donors through Shares **may never be sold or exchanged by the Recipient.**
- Unless clearly authorized by the individual, names of donors who have designated to a member group through Shares shall not be published in **newsletters, annual reports, electronic publications**, etc. The Recipient is instead encouraged to identify Shares supporters with a general recognition of "all the generous support from individuals through Montana Shares" or "Montana Shares Workplace Donors," perhaps including the Shares logo.
- Recipients are encouraged to include these individuals at their HOME addresses or PERSONAL email addresses on your newsletter or educational publication mailing list.

History of Policy:

Revised by Executive Committee, at request of Council, on 3/1/10, for same effective date

Revised by Executive Committee 3/29/11

Revised by Electronic Vote of Montana Shares Council 4/3/13