

## ELIGIBLE CATEGORIES

Organizations that the Charles M. Bair Family Trust Board of Advisors may consider are as follows:

**Educational Institutions**, both public and private, that are located in Montana, with an emphasis placed upon colleges and universities.

**Hospitals and organizations providing health-related services**, including medical research organizations, health maintenance organizations, blood banks, and hospices.

**Cultural organizations**, including organizations involved in the performing or visual arts, historical centers, museums and zoos.

**Civic service organizations**, including organizations that promote community development and provide public services.

**Human service organizations**, including organizations providing services to children, senior citizens, handicapped persons and poor and distressed persons.

## INELIGIBLE CATEGORIES

The Board will not generally award grants to the organizations or for the uses listed below:

- Political organizations, candidates and campaigns
- Propaganda campaigns for political causes or lobbying activities
- Churches, conventions or associations of churches
- Non-charitable organizations, even if the grant is intended to be used for charitable purposes
- Grants or loans to individuals
- Grants for conferences, symposiums or travel expenses
- Corporate memberships or contributions to associations that directly benefit corporate entities
- Supporting organizations described in Section 509(a)(3) of the Internal Revenue Code.
- Private Foundations

**CHARLES M. BAIR**

**FAMILY TRUST**

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**FAMILY TRUST**

**U.S. Bank,  
National Association**

**303 North Broadway**

**P.O. Box 30678**

**Billings, Montana 59115**

**(406) 657-8139**

## APPLICATIONS GUIDELINES

## ABOUT THE TRUST

The Charles M. Bair Family Trust was established to commemorate the legacy of one of Montana's greatest and most influential families. The Bair family's dedication to philanthropic work in Montana is carried on, in accordance with the wishes of the last surviving member of the family, Alberta M. Bair, who died in May 1993.

Today, the Trust strives to continue the direction and initiatives maintained by Alberta M. Bair and her late sister, Marguerite, in granting financial contributions to qualifying organizations. Grant applications and accompanying certification of tax-exempt status are reviewed by a Board of Advisors (The Board).

The Board consists of a designee from U.S. Bank; a designee from U.S. Bank, personal trust department; a designee of the law firm of Moulton, Bellingham, Longo & Mather, P.C.; and two members at large from Meagher, Wheatland and Yellowstone Counties; but with not more than one member to be from the first two counties named above.

The Board has discretion to determine the amount of funding from the Trust available for charitable, religious, scientific, literary or educational purposes, within the meaning of Section 501(c)(3) of the Internal Revenue Code and its corresponding regulations.

The Board is also vested with the authority to select annually recipients who receive funding from the Trust. The only limitation placed on grant recipients is that charitable organizations must be located or domiciled within the State of Montana. Strong preference will also be given to applicants from Yellowstone, Meagher or Wheatland Counties in Montana.

## HOW TO APPLY

Before applying, an organization should review the information in this brochure to determine the organization's eligibility for a grant from the Charles M. Bair Family Trust. The organization should carefully answer each question listed on the application.

## GUIDELINES

The grant application must be accompanied by a typewritten summary of two single-sided pages or less that describes the applicant organization and the specific program or project for which it is seeking a grant.

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**Applicants must complete the certification of public charity.**

Applicants must be organized under Section 501(c)(3) or Section 170(c)(1) of the Internal Revenue Code. Applicants must attach to the grant application a tax determination letter from the Internal Revenue Service verifying its organization's tax-exempt status as either a non profit entity or a government agency. Government entities must request the tax exempt status letter from the IRS. **The EIN and tax determination letter must be that of the applicant.** One organization cannot sponsor another organization's grant request or create partnership for a grant because one entity does not meet requirements of IRS section 501(c)(3) or Section 170(c)(1).

If an applicant organization is a Section 501(c)(3) organization that is not a private foundation, it must also attach to the grant application a copy of its latest annual information return (Form 990 or Form 990-EZ). If the current tax return is due but not filed, and an extension has been granted by the IRS, the IRS approval of the extension of time to file must be included. **If the applicant organization is not required to file a tax return, an explanation that it is not and why must accompany the application.**

An applicant organization must submit a copy of its current operating budget and balance sheet and briefly describe how its on-going funding will be achieved.

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**One Original plus One Copy** of the grant application and typewritten summary pages with one set of supporting evidence as required should be mailed as directed below. **Please do not staple material.**

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**No additional brochures, CDs, pamphlets, promotional material will be accepted. Because documents will be copied, please limit material to black and white copies and do not place in binders or folders.**

## GRANT APPLICATION DEADLINE

**March 1<sup>st</sup> Annually.** If March 1<sup>st</sup> falls on a weekend, the grant applications will be due the following business day.

Applications must be postmarked by the above dates and received no later than three days afterward for consideration within the current funding cycle.

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Grant requests are reviewed as received to determine eligibility and completeness. Every reasonable effort will be made to contact applicants if application does not meet requirements if received no later than February 25<sup>th</sup>. It is for this reason that we strongly encourage organizations to consider submitting grants early. Current grant forms request both telephone numbers and email addresses to assist in requesting any additional information needed. Additional information may be requested by email and may be submitted by scanned document attached to email reply.

Contact Information for Charles M. Bair Family Trust:

**Charles M. Bair Family Trust**  
**U.S. Bank Trust, N. A.**  
**303 North Broadway, P.O. Box 30678**  
**Billings, Montana 59115**  
**Website: [charlesmbairtrusts.org](http://charlesmbairtrusts.org)**  
**Telephone: (406) 657-8139**  
**Email: [penny.doak@usbank.com](mailto:penny.doak@usbank.com)**

### **APPLICATIONS MUST INCLUDE**

- The organization's IRS letter of determination
- Form 990 or 990EZ (or an explanation as to why the organization is not required to file)
- Current operating budget *and* balance sheet
- The county of service listed on application
- Separate thorough project explanation
- Certification as a public charity

### **INCOMPLETE APPLICATIONS**

**Incomplete applications will be returned to grant applicants and considered, if completed application is re-submitted by the March 1<sup>st</sup> deadline.**

### **NOTIFICATION OF GRANT AWARDS**

The Board will send a written response to grant applicants within 90 days of the grant application cycle deadline. The Board may, at its discretion, give priority to time-sensitive requests.

### **ANNUAL REVIEWS**

Grant awards will be reviewed annually. To assist in such reviews, documentation from grant recipient's confirming the uses funds is required. **Grants must be used for the purpose as stated in the original application. Any grantee failing to timely file grant reports will become ineligible for future grant consideration.** All grant recipients must consent to The Board's use of their names and purposes in publicizing grant awards.