



Opportunity Bank[®]

OF MONTANA

CHARITABLE CONTRIBUTIONS GUIDELINES

I. Philosophy and Guidelines

Opportunity Bank is committed to promoting the quality of life in its service areas: Broadwater, Cascade, Gallatin, Jefferson, Lewis and Clark, Madison, Missoula, Park, Ravalli, Silver Bow, Sweet Grass, and Yellowstone counties. Through contributions to qualified nonprofit organizations, as well as funding of an Endowment Fund, Opportunity Bank supports activities which address the needs of our communities and promote their health, education, and advancement.

Requests for funding are considered in the following areas:

Health and Human Service Programs and Organizations - Support to charitable drives such as the United Way, hospitals, affordable housing, youth and senior citizen organizations, and other local groups.

Education - Support for public and private higher education institutions, scholarship programs, community education programs, and other educational activities.

Cultural Activities - Support for performing and visual arts programs, museums, historical centers, and other related activities.

Nonprofit advertising requests (programs, etc.) in these areas are also eligible.

Organizations receiving contributions should be able to demonstrate the impact of their programs on the community. Special attention is given to organizations which serve large numbers of people, have strong community support, and offer opportunities for volunteers.

Requests for funding are generally denied for:

- Individuals
- Religious organizations for religious purposes
- Political campaigns
- Organizations primarily involved in lobbying
- National charities
- Out-of-town trips for performing groups
- Contestant expenses for beauty pageants or similar activities
- Drug abuse publications
- Telephone solicitations
- Projects that do not have a primary impact on the geographic areas served by Opportunity Bank.

II. Requests for Contributions

Requests for donations should be made in person or in writing to Opportunity Bank. The following procedures should be followed when making requests:

Requests for less than \$250: Verbal or written requests may be approved by a branch supervisor or any bank officer. All verbal requests should be made in person.

Requests for \$250 to \$2,500: Written requests or requests accompanied by printed literature or descriptions of the project should be submitted to the Marketing Officer, Area Manager, Market President, or President, who will have final approval.

Requests for \$2,500 to \$5,000: Written requests or requests accompanied by printed literature or descriptions of the project should be submitted to the Marketing Officer, and subsequently discussed with the Charitable Contributions Committee, who will have final approval.

Requests over \$5,000 and Multi-Year Requests: Single requests over \$5,000 (and multi-year requests exceeding \$10,000) must be made in person and accompanied by printed literature or descriptions of the project. Requests over \$5,000 will be considered for “grant giving”. Should the request qualify as a grant, organizations are encouraged to then take steps to publicize these awards. All grants should have tax-exempt status under section 501 (c) (3) of the Internal Revenue Code. Organizations or projects requesting over \$5,000 should complete an application and submit it with any related material to the Marketing Officer, and will be discussed further with the Board of Directors.

**** Grant recipients are encouraged to publicize their awards to their contributors and local news media.***

III. Employee Volunteerism

Opportunity Bank of Montana also recognizes the importance of volunteer efforts in successful community improvement programs. Employees are encouraged to devote their time and resources in support of community organizations. Opportunity Bank allows all employees twelve hours of paid leave per calendar year (during normal working hours) to devote to volunteer efforts. (Bank officers will have separate guidelines for volunteer leave). The twelve-hour limit does not apply to volunteering for company-sponsored events, such as the Festival of Trees.

IV. Community Visibility

As a community business partner, Opportunity Bank must also consider its visibility and goodwill within the community. Therefore charitable contributions and employee volunteerism will be publicized through the following means:

- An “Opportunity Bank of Montana” community board in each branch
- Volunteers may also be recognized on the Bank’s Facebook or LinkedIn sites
- The Bank’s website, occasional press release and media contacts