

**Summary and Meeting Notes of  
Strengthening Montana's Local Community Foundations  
April 15, 2011  
First Interstate Bank Conference Room, Bozeman MT  
Facilitated by Peggy M. Owens, CFRE**

**Summary**

The Strengthening Montana's Local Community Foundation meeting was conceived and coordinated by Tawnya Rupe and Kelly Bruggeman. Both of their respective organizations, the Mountain Sky Guest Ranch Fund and First Interstate Bank Foundation, sponsored the well-attended, all-day session. Those in attendance learned about the work Montana Community Foundation is doing with the 44 affiliates under its umbrella and listened to a presentation by Jeff Yost, CEO of the Nebraska Community Foundation.

Participants examined the capacity of local community foundations (LCFs) in Montana, what resources are currently available to assist them and talked about how this group could support the effort. There was appreciation for the survey conducted by the Montana Community Foundation (MCF) and the insight it offered but it was determined that additional data was needed to gain a greater understanding of Montana's Local Community Foundations. A plan was developed to survey all 67 of the local community foundations in the state.

It is clear Montana's LCFs need more resources to assist their development. A long list was identified on May 15 that included operational funding, staffing, training, board development, visioning and development of the LCFs role in their respective communities. Building on some of the efforts already underway was seen as possible first step with an emphasis on the fall statewide LCF convening. Every Montana LCF will be invited to the second year of this event sponsored by the Mountain Sky Guest Ranch fund. It will be held October 9-11<sup>th</sup>. There is a team of LCF representatives, with support from MCF's Cathy Cooney, planning this effort. It was recommended to encourage funders to attend and network with LCF representatives this fall.

There was concern expressed that LCFs may not be able to build their capacity fast enough to take advantage of the imminent transfer of wealth, an estimated \$64 million in Montana. Examples of success in Nebraska in capturing the transgenerational transfer of wealth gave the group ideas about the positive results that could occur if Montana's LCFs built their capacity. Overall the group was very positive about building the capacity of LCFs so these resources will stay in Montana's local communities supporting a wide range of activities.

**Next Steps**

The group reached a consensus to move forward with the following:

1. A working group will begin meeting to maximize the opportunity afforded by the upcoming Philanthropy Northwest Conference. This group will consist of Mindi Reule, Philanthropy Northwest's staff who is working on the community foundation initiative, Daniel Kemmis, Dawn McGee, Kelly Bruggeman, Mike Schechtman, Tawnya Rupe. Bill Pratt, Linda Reed, and Cathy Cooney.
2. Develop and implement a survey of all Montana Local Community Foundations. Montana Community Foundation will lead this effort and will work with the LCFs to shape it. Dan Clark will assist with the process by utilizing resources at Montana State University. Tawnya Rupe will also connect with an expert with the Arthur M. Blank Family Foundation. The survey will be sent with a cover letter from Kelly Bruggeman and Tawnya Rupe, representing this neutral consortium and include a letter summarizing this meeting.

3. Expand the fall convening as resources allow. Include funders and provide networking opportunities. Consider getting sponsorships from the financial adviser community to cover the costs for an expanded event this year that will include an additional day and more presenters. The budget is currently being developed by the planning team. Mary Stranahan volunteered to seek funding from three corporations.
4. The entire group agreed to stay involved with this effort and continue the conversation about strengthening Montana's LCFs at the Philanthropy Northwest Conference (if possible) and the fall convening. Topics of conversation could include identified priorities such as strategic planning, developing and defining a neutral consortium.

## **April 15, 2011 Meeting Notes**

### **1. Meeting outcomes were reviewed by the group.**

- Identify current connections and support of community foundations
- Discuss the capacity of local community foundations in Montana
- Learn successful approaches from another rural state
- Explore a collaborative approach to enhance the efforts of Montana's local community foundations
- Develop a vision for strengthening Montana's local community foundations

### **2. Participants introduced themselves, expressing their interest in Montana's Local Community Foundations:**

<b>Name</b>	<b>Organization(s) Represented</b>	<b>Connection/interest in Montana's Local Community Foundations</b>
Cathy Cooney	Montana Community Foundation	Program Director Works directly with LCFs in Montana. Has extensive experience providing support for this nonprofit sector.
Bill Pratt	Big Sky Institute	Projects Coordinator Served as the first Program Director for Montana Community Foundation; Helped establish 15 LCFs
Brad Robinson	Montana Nonprofit Association	Member Services Director Involved indirectly. 25-27 LCFs are MNA members. MNA provides technical assistance and training to nonprofits
Jo Ann Eder	O.P and W.E Edwards Foundation	Board member of the Red Lodge Community Foundation, supports other nonprofit efforts
Mary Stranahan	High Stakes Foundation & Flathead Valley Community Foundation	Funder & Board member Supports LCFs in eastern Montana
Daniel Kemmis	Kettering Foundation & Philanthropy Northwest & NW Area Foundation	Involved on many levels. Works toward more effective philanthropy The Kettering Foundation mission is focused on community and democracy..
Mindie Reule	Philanthropy Northwest	Program Manager Interested in how Philanthropy Northwest can support its community foundation members

Kelly Bruggeman	First Interstate Bank Foundation	Vice President of the FIB foundation Convener of this meeting. Supports nonprofit efforts in Montana, Wyoming and South Dakota
Tawnya Rupe	Arthur M. Blank Family Foundation & Park County Community Foundation	Program director for Mountain Sky Guest Ranch Fund, supporting nonprofits in Park and Gallatin Counties Board member Park County Community Foundation Convener of this meeting.
Felicia Ennis	Oro Y Plata Foundation & Park County Community Foundation	Interested in being a better resource both financially and in other ways of LCFs. Board member of Park County Community Foundation.
Mike Halligan	The Dennis and Phyllis Washington Foundation	Executive Director of the foundation, interested in encouraging collaboration among LCFs and public policy. Small grassroots community foundations have a powerful message.
Linda Reed	Montana Community Foundation	Provides support to LCFs. Interested in LCF's role in community development. MCF also does public policy work, e.g. the Montana tax credit that promotes giving to LCFs.
Dan Clark	Montana Community Foundation & MSU Local Government Center	Board member of MCF on the LCF committee. Director of Local Government Center Works in community development, connecting LCF's and local government.
Jan Lombardi	Governor's Office of Community Service	Executive Director Partners with LCF's and provides volunteers and local funding. Working on Build Montana portal with MNA
Michael Schechtman	Big Sky Institute	Executive Director History of working with LCF's. Current interest is building LCF's capacity to support community nonprofit networks and early child care efforts
Dawn McGee	High Stakes Foundation	Executive Director Has met with 15-20 LCF's listened to their issues. Understanding how they can be engaged to meet needs.

### 3. Presentation from Montana Community Foundation on the Landscape of MT local Community Foundations and the Findings from a Recent "Needs" Survey of Local Community Foundations

given by Linda Reed, Executive Director and Cathy Cooney, Program Director.

The survey identified the following needs of affiliate LCFs:

- Grant making knowledge and ability
- Recruiting/engaging board volunteers

- Education about transfer of wealth
- Capacity for paid, professional staff
- Lack of local/motivated leadership
- Sponsor for the continuation of the annual Montana LCF 2012's convening
- Fundraising (asset development)
- Sustainable support
- Advocacy/education
- Board vision

**4. Meeting participants worked in smaller groups, identifying untapped resources and opportunities for Montana's Local Community Foundations. After hearing the presentation of the Montana Community Foundation, they were asked to determine what additional data is needed to identify the capacity of Montana's LCFs.**

***Additional data needed about Montana LCFs:***

- More general survey covering all LCFs would be helpful. It should cover the following areas:
  - Staffing, vision/mission, grant making amounts, assets, leadership, current capacity of Montana's LCF's
  - Data gathering should also find out from LCFs what has worked and what hasn't

***What resources does it appear LCFs need?***

- A need for deeper engagement to help LCF development
- Multi-year operating support
- Staff and additional funding
- Training: financial management, grant making, computer constituent management software, mission, vision, definition of role, board development, community organizing, advocacy skills
- Training needs to be tailored to very small LCFs
- Diverse boards
- Ability to define value added of having a local LCF
- New model for LCF development involving collaboration and regionalization
- What are their dreams? Reflect them through strategic planning after listening to the community.
- Infrastructure
- Coaching: help getting through the initial stages of development (Packet on community foundation fundamentals)
- More technical assistance
- Development of an endowed fund to sustainably fund operations of LCFs
- Developing a sustainable LCF requires a corpus of \$4 million
- Understanding how to leverage already existing community resources
- LCFs have to take an umbrella view
- LCF could be the board everyone wants to be on
- Visibility: How do we move a board from being reactive, "feel good" fundraising to strategic grant making?
- How to articulate the reason for local investment
- More people need to be involved to further the conversation
- Leadership cultivation training
- Goal setting
- Overall marketing

- Technology: website(interactive content management), software, databases
- Awareness of opportunities to move forward while retaining their community roots

***What resources are available to LCFs?***

- Transfer of Wealth
- Boomers and retirees, returning expatriates
- Opportunities to connect with and tap into people who are moving back to Montana after successful careers
- Relationships in the community, e.g. high school reunions will help connect to those with wealth coming home. This links to local school foundations and alumni connections.
- Council on Foundations training
- CF Insights, data benchmarking
- Foundation for Community Vitality model of development
- Philanthropy Northwest conference and grant making training
- Montana Nonprofit Association
- Association of Fundraising Professionals Montana Chapter
- MSU Extension
- Hopa Mountain
- Governor's Office of Community Service
- Big Sky Institute for the Advancement of Nonprofits
- Leadership development models that can be applied to LCFs

***What untapped opportunities are available?***

- More diverse leadership from a wide range of socioeconomic classes and ages
- Peer mentoring/handholding after training to implement
- Social media/statewide networking
- Mastermind group-Skype
- Concern that LCFs can't grow fast enough to adequately capture the time limited transfer of wealth opportunity
- Montana Community Foundation could extend its back office services
- Tap expertise of nonprofits for skill development including advocacy
- Utilize nonprofit executives for LCF boards
- More local understanding regarding nonprofits. LCFs can coalesce folks locally for this community education. LCFs serving as the focal point for civic engagement.
- Philanthropy Northwest's hosted stage-based nonprofit lifecycles, presented by Susan Kenny Stevens

**5. A videoconference was held with Jeff Yost, CEO of the Nebraska Community Foundation. He shared a power point presentation on trends and the overall progress they are making in Nebraska. There was an opportunity for open-ended discussion at the end of the conversation.**

**6. Breaking into small groups again, meeting participants considered how they could work together to strengthen the capacity of local community foundations and the contributions it could make to increase local community foundation's ability to serve their respective communities.**

***Working together to strengthen the capacity of local community foundations:***

- Continue the conversation
- Marketing: Develop a transfer of wealth marketing campaign

- Funders to attend the LCF convening at Mountain Sky Guest Ranch this fall to have a conversation with them about their needs.
- Support the LCF fall convening with funding to allow for more time and more groups.
- Expand the convening using offsite resources
- Conduct another survey to determine needs of Montana’s LCFs. It should include a programmatic evaluation of LCF capacity
- Leverage existing efforts to address the gaps identified in the survey
- Create a consortium to identify and coordinating resources—a neutral body of support to include extension, the Montana University system, RC&Ds, Chambers of Commerce. Involve LCF superstars in the process.
- Share information about what’s working with LCFs
- Piggyback on this conversation and share info about this meeting with LCFs
- Tap into the Philanthropy Northwest Conference this fall
  - Highlight the work in Montana to get funder interest from Philanthropy Northwest attendees
  - Funders work with Philanthropy Northwest to subsidize scholarships for LCFs
  - Need a relevant track for LCFs
  - Highlight resource needs
  - Get appropriate partners on panels
  - Montana tells its approach to collaboratively fund LCF development
  - Form a working group to take advantage of Philanthropy Northwest Conference opportunity
- Develop Webinar 101 series, incorporating preexisting resources

***What contributions can this group make to Montana’s LCFs?***

- Fund LCF training and statewide convening
- Provide funding
- Share expertise
- Give financial advice
- Cover the registration fee for Council on Foundation webinars and the Philanthropy Northwest Conference
- Make a concerted effort to share information about what LCFS are doing, e.g. Park County Community Foundation’s work in that community
- Identify high-performing LCFs
- Funders could join the LCF Google group
- Fund an expanded survey
- Take an inventory of this groups interests and assets
- Develop a strategic plan or at least a SWOT analysis for developing knowledge of the landscape before reaching out to other funders in the state
- Lend legitimacy to the process
- Utilize the video network available for training

**7. The group summarized and prioritized the next steps that will be taken to strengthen Montana’s local community foundations. They are listed below with the top priority actions first.**

**Top priorities for next steps:**

- Take advantage of the Philanthropy Northwest Conference
- Survey all of Montana’s LCFs

- Enhance the fall convening. Invite funders, allow for more networking and a longer meeting. Obtain additional sponsors and funding. Mountain Sky Guest Ranch is again hosting the 2011 gathering.
- Utilize this group as a neutral consortium to allow for engagement of all interested parties
- Develop a plan to clarify steps to be taken to strengthen LCF's that includes an overarching vision, strengths/weaknesses/opportunities/threats analysis, and understanding of assets and how to overcome challenges.
- Continue the conversation
- Partner with Native Americans

#### **Other ideas**

- Prioritize which LCFs to involve in this process
- Provide matching funds for endowment building
- Connect with Sen. Baucus regarding the Philanthropy Growth Act and Nebraska Community Foundation's success at garnering federal funding through the USDA and SBA
- Reach out to other funders to determine their interest
- Scope out interest of invitees who couldn't be here today
- Connect with large foundations to endow their program vision in rural states like Montana
- Get more information from Jeff Yost to learn how Nebraska Community Foundation obtained a diverse funding stream to support LCF's.