

Strengthening Montana's Community Foundations Survey Summary

Prepared by –
Peggy M. Owens, CFRE



Fall 2011

BACKGROUND

On April 15, 2011, Kelly Bruggeman of the First Interstate Foundation and Tawnya Rupe of the Mountain Sky Guest Ranch Fund and Arthur M. Blank Family Foundation, hosted a gathering of funders and resource organizations from across Montana to explore the potential of a collaborative approach to strengthen local community foundations (CF's) in the state. The meeting was facilitated by Peggy M. Owens of Sage Solutions Nonprofit Consulting, LLC. The meeting was an opportunity to learn more about the landscape of community foundations in Montana, and a platform to discuss the potential of Montana CF's.

There are 67 community foundations in Montana, which operate independently or under Montana Community Foundation. The cumulative assets of all community foundations in Montana are approximately \$75 million. Most of the local community foundations are less than ten years old, have no staff and have limited resources to expand. With the increase in state and federal budget cuts, it is increasingly important that communities operate collaboratively and efficiently. Community foundations can not only support this culture, but help foster civic engagement and local philanthropy.

It is projected that over the next ten years, nearly nine billion dollars will pass out of the estates of Montana residents. Participants of this convening identified that local community foundations will be critical to ensuring that a portion of that wealth remains in the state.

The group decided on three near-term action items coming out of the meeting: conduct a survey/assessment of CF's in Montana in order to better understand their needs; form a work group to ensure community foundation involvement in the Philanthropy Northwest 2011 Annual Conference in Missoula; and support the community foundation convening at Mountain Sky Guest Ranch this fall. It was agreed that the first priority of this conversation is to learn from MT CF's directly, regarding their challenges and opportunities through a survey.

The results of this survey are below. Board and staff from CF's were encouraged to work together to complete the survey. Information from this survey will be used for discussion and planning at the gathering of MT CF's at Mountain Sky Guest Ranch this fall. At the gathering, participants will have an opportunity to review and discuss the survey. The group who met in the spring will participate in the discussion and then reconvene to develop a plan to support CF's.

The group who met in April 2011 heard a report on a survey of their affiliates conducted by the Montana Community Foundation in April 2010. The surveys are not identical. The survey summarized here is more detailed. However, there are some interesting similarities and differences in the findings between the two surveys. These are summarized briefly on page 7.

SURVEY SUMMARY

Accomplishments and Strengths

Respondents to the survey were asked to list their top three accomplishments. Areas mentioned by most of the community foundations were growing/building endowment, making grants and supporting their community in a variety of ways. Many are also proud of the work they've done to promote philanthropy in the community and to increase general awareness of who they are and what they do.

Board volunteers were listed as the greatest strength by many of the foundations. Staff was also identified as a strong element by the organizations that are staffed. The support given to communities by CF's was identified as a strength, along with community awareness.

Participating Organizations

Most of people who completed the survey were board members. The group reflected large and small community foundations from around the state. Most of the community foundations have been established since 2000. Only one foundation was established before 1990, with five starting in the 1990's. 70% of the organizations have nonprofit status.

Over 60% of the CF's have between one and three funds; 8% have between 3 and 10 funds; 22%, or five CF's, have more than ten funds. Slightly more than half of the organizations do not manage donor advised funds. Of these, 30% manage between one and two funds. 40% manage between 3 and 5 funds. Only one manages over 20 funds. Most have no minimum size for donor managed funds. A third require a fund to be over \$20,000. 17% have a minimum of between \$3,000 and \$5,000. There is a wide range among CF's as to the size of their endowments with over half holding less than \$300,000 in assets and 37%, less than \$100,000. Three CF's have between \$1 million and \$5 million in endowed assets. One has assets over \$5 million. 53% have over 50% of their assets in unrestricted funds.

Approximately a third of the respondents have budgets under \$5,000. Almost 60% have budgets between \$5,000 and \$25,000. 10% have budgets between \$50,000 and \$100,000 and 9% have budgets over \$200,000. Most grant between \$5,000 and \$25,000 annually with two granting over \$200,000. 59% of the dollars for annual grant making do not come from donor advised funds.

Board of Directors

Most organizations have between six and 10 board members. All but 26% have committees. These range from committees typically found in nonprofit--executive, finance, marketing and development--to those specific to community foundations, e.g. grant making. Only three have governance or board development committees. Board meetings are held monthly in 78% of the organizations.

Staff

Almost 35% of the community foundations have paid staff with 17% utilizing the services of contract staff. 30% have less than two paid staff. Only one organization has more than five staff. Only one organization has staff besides the Executive Director/CEO focused on fundraising efforts.

91% of the respondents who have part-time staff agree it is important to increase staff support. Most organizations began having paid staff recently, in the past five years. Staff is paid through foundation grants, endowment revenues and fundraising revenues. 30% are paid through restricted donor gifts.

40% of the respondents who have no staff do not feel it's important to have paid staff. 30% of this group feel it's somewhat important to add staff; with the remaining 27% ranking the addition of staff to their LCF as important to very important.

Mission-related Activities and Challenges

The top five activities ranked important to fulfilling the CF's mission are:

- Keep local wealth/assets in the community permanently
- Raise money for endowments
- Help local donors be philanthropic
- Provide funding for local nonprofits
- Raise money for grant making

The top six areas that would be most helpful to CF's to accomplish their mission are:

- More money for endowments
- More money for immediate grant making
- More active board members
- More fundraising skills
- Marketing and promotional materials
- More technical assistance and professional development

The top five areas these community foundations currently engage in are:

- Community grant making
- Raising money for an unrestricted endowment
- Promoting philanthropy for individuals in the community
- Raising money for current grant making
- Promoting legacy giving (bequests) and/or planned giving

The top six areas of greatest challenge in fulfilling the CF's mission are:

- Reluctance of board members to solicit planned gifts or bequests
- Lack of time on the part of board members or volunteers
- Low visibility in the community
- Lack of paid staff
- Difficulties in recruiting board members
- Lack of fundraising skills

Fundraising

The top three priorities for fundraising activities are:

- Growing an unrestricted endowment
- Attracting new funds (donor advised, designated, etc.)
- Raising operating support

The top five fundraising strategies utilized by CF's are:

- Annual appeal (fundraising letter)
- Individual visits to prospective or current donors
- Cultivating relationships with local financial professionals for referrals
- Internal solicitation from board members (current and former)
- Fundraising events

Top five activities identified to help deepen relationships with donors:

- Send hand-written thank you note
- Send a newsletter
- Call and thank donors when they contribute
- Hold an annual donor appreciation event (not a fundraiser)
- Meet with donors individually to keep them informed of community foundation activities

This group of CF's sometimes involves donors in activities through educational seminars and by asking them to volunteer. Some also do these activities rarely and also invite donors on site visits only rarely.

The top four areas where support is sought from funders are:

- Operating support
- Donations to endowment fund(s)
- Participation on community foundation's board of directors, and/or grants committee
- Partner for capacity building projects
- Sponsorships for fundraising events

19% of respondents do not seek this type of support

Grant Making

Six of the CF's surveyed granted \$6,000 or less last year. Six gave between \$10,000 and \$15,000 in grant awards. Four gave between \$20,000 and \$35,000. The three remaining gave \$129, 125, 633,000 and \$2.3 million.

86% award grants through open solicitation to all local nonprofits. 24% make awards to support major community projects. 10% award grants only through restricted funds. 10% focus grant making on specific community needs or topics or limit grants to competitive applications with specific program areas, like youth.

Organizations primarily (92%) gather information on community needs from general community knowledge. 51% convene community members while 25% have done community surveys or needs assessments.

The most challenging obstacle for 74% of respondents to effective grant making is insufficient grant money to make a significant impact. Approximately 30% also see reactive grant making and the inability of local nonprofits to prepare good grant applications as challenging.

Leadership Activities

The top five leadership activities engaged in are:

- Nonprofit networking (44%)
- Capacity building for local nonprofits or community groups (35%)
- Convening community members or groups to do projects, solve problems or discuss issues (35%)
- Fiscal sponsorships (26%)
- Facilitate a community planning or visioning process (26%)

The top five areas community foundations have been involved in collaborative leadership are:

- Nonprofit organizations
- Service clubs and civic organizations
- Local or county government
- Local schools and other educational institutions
- Family, private or corporate foundations

Almost half of the CF's boards regard increasing the community foundation's collaborations with community partners as very important.

Capacity building for Montana's Local Community Foundations

The top three priorities for capacity building if there was available funding are:

- Training workshops
- Consultant assistance
- Financial assistance for hiring staff

The top four ways CF's would be willing to participate in the broader community foundation sector in Montana are:

- Participate in annual training workshops
- Participate in the google group for Montana Community Foundations
- Attend statewide convening for community foundations
- Participate in networking events

All but one respondent are interested in participating in sector-wide activities in some form.

The number one training priority is in the area of fundraising, followed by board training. Marketing and communications is also ranked high, followed by planned giving and the Montana Tax Credit.

If consultation assistance was made available, areas of identified need are marketing, planned giving and fundraising.

Brief Comparison between Findings of April 2010 Montana Community Survey and September 2011 Survey

The organizations in the September 2011 survey have boards that meet more frequently. More of them also have paid staff. There were almost identical responses from both groups in the area of mission related activities, areas that would assist in achieving goals and actions CF's take to achieve their goals. They shared the top two responses in each of these categories. Key challenges shared were limitations of their volunteer boards.

Respondents in the 2011 survey were more likely to conduct annual appeals, make individual visits with prospects/donors, solicit the board for gifts and to conduct fundraising events when compared to MCF affiliates.

The top way grants are distributed for both groups is through open solicitation to all local nonprofits. MCF affiliated survey respondents were more likely to focus grant making on specific community needs and to support major community projects. Both surveys indicated organizations gather information on community needs from general community information and that insufficient grant money is the most challenging obstacle for grant making.

The top leadership activity for MCF affiliates is community education compared to nonprofit networking for the group representing all CF's in Montana.

When it comes to participation in the broader community foundation sector, respondents to both surveys shared similar priorities with "participate in annual training workshops" ranked highest.

September 2011 Survey Results and Summary of Open-ended Responses

What are your foundation's most important accomplishments? (Ranked first)

| |
|--|
| Endowment: Growing our endowment. Built an endowment with MCF. Establishing the permanent endowment fund. Being able to accept annuities |
| Formation: Officially becoming a community foundation. Getting formed. Establishing a framework for local philanthropy. REACHINGOUR GOAL TO BE AFFILIATED MEMBER OF MTCF. Actually getting started and keeping the board going. |
| Supporting Community Nonprofit Shared Services Center being developed. Realizing the potential of-- and utilizing--Fiscal Sponsorship as a tool to achieve our mission, and as valuable resource and asset to the community |
| Grant making: Within 2 years awarding five to six grants per cycle Granting over \$400,000 since 2005. Contributions to dozens of nonprofits. Since 1999 we have granted more than \$100,000 to Bozeman Area Nonprofits. Giving out over \$600,000 in grants last year from DAFS and our Community Grant Program. |

Promoting philanthropy in community for community. Keeping monetary asset in our area for our use and future growth. Philanthropic leadership in the community using indicators. We established our goals and developed a brochure describing, among other things, how to leave a legacy to the GFACF.

Other: Meeting our Schlessinger Match Goal. Travel & Tourism Visitor Center. I-164-enacted in 2010

What are your foundation's most important accomplishments? (Ranked second)

Endowment: We have built an endowment, including some donor advised and non-advised funds Building our discretionary financial resources to invest in providing quality programs. This includes establishing an endowment. \$55 million in assets. Attracting a roughly \$1 million Donor-Advised Fund. Increasing our Endowment Fund to \$1 Million.

Grant making: Giving over \$100,000 in grants since 1999. GIVING OUT OVER \$10,000 IN GRANTS TO COMMUNITY ORGANIZATIIONS. Service to non-profits. Successful grants program. Making our first modest grants. Putting grant money back into our community. Attaining our 25,000 goal.

Supporting Community: Community Conversations. Community place for discussions. Youth & Recreation Renovation of Community Swimming Pool. C3-Creating Community Change Leadership Program. We participated in and financially supported a visioning session in our community. Being a convener of the Envision Polson! Project has elevated our standing in the community. Supporting Community Childrens Groups. Fiscal Sponsorship. Providing leadership within the community.

Fundraising: Nye goes Nuts annual fundraiser (ATV raffle)

Promotion: Trying to get our name familiar in the community

Staffing and Leadership: Hiring an Executive Director. Gathering momentum within the local board members

Other: IONS. Implemented \$20,000 in building improvement last year

What are your foundation's most important accomplishments? (Ranked third)

Supporting Community: Strengthening networks. Helping local non-profits at critical times. In 2011 we conducted a needs assessment of our nonprofit community. Telecommunications Help finance system in school. Community organization and support (school&NVFD). We held a workshop for non-profits on building endowments with Cathy Cooney as the speaker. Nonprofit Education. Expanding our leadership role in convening and connecting community benefit efforts and resources. Helping where groups fall short of money to perform needs.

Fundraising: Membership from 10 to 100 in 1.5 years. Having social functions to get more known that are also fundraisers. Attracting a BN grant.

Grant making: Successful granting. We have awarded grants for three years. Giving out over \$100,000 in grants locally from the Community Grants Program

Promotion: COMMUNITY AWARENESS THRU EVENTS LIKE COMM. VISIONING AND ESTATE PLANNING. Estate planning seminar in our community.

Advocacy: Endowment Tax Credit-enacted 1997

Endowment: Reaching almost 2 million in managed assets to date

Board Development: Attracting geographically diverse Board members

Organizational Development: Developing a strong foundation as an organization. Developing Policies and Procedures that endure.

Other: Service to local philanthropists. Willingness of members to get involved.

What are your foundation's greatest strengths? (Ranked first)

Board and Volunteers: Diverse board including family foundations. Experienced board members. Many committed volunteers, most serve on the board. We are gradually developing an active and creative board. Committed board. We have a diversified board of directors. A committed board. Diverse board of directors that works very well together. An excellent giving, leading and working Board

| |
|--|
| Community Support: Come to the need of our community. Helping the nonprofits in our area to accomplish their goals. This is a poor county and sometimes with our grant money they can accomplish a project they are working on. Serving Donors and Nonprofits throughout Flathead Valley. Personalized service. Neutral convener-active listening-go to organization. We are very familiar with area needs and projects |
| Community Awareness: Community friendship. Community credibility. Developing pr tools such as brochures, flyers |
| Endowment: We have established endowment funds |
| Staffing: Committed Executive Director. Professional Staff |
| Organizational Development: Strong internal operating structures to align with industry best practices and standards. |
| Funding: We have a good base of money to work with. |
| Other: PERSISTANCE |

What are your foundation's greatest strengths? (Ranked second)

| |
|--|
| Board and Volunteers: we have financial expertise in house (on the board). A board full of various talents that are assets. DEDICATED BOARD MEMBERS. Motivated board. We are having growing pains trying to get Board members who will work. Some of our Board members are dedicated and want to grow the organization. Only time will tell how far we will get. Geographically Diverse Board members. Vision of founders |
| Staff: Staff who knows the players in the community. Staff member. Interested and involved staff. Good contracted services - Administrative Assistant. We are backed by the professionalism of the MT CF. |
| Community Awareness: Residents are starting to recognize our importance. Broad-base of community support. Statewide recognition. Connection to the local community. A strong presence in the Community now. |
| Community Support: Recording and respecting our diverse community history. There are lots of non-profits needing help. Our involvement in the community |
| Grant Making: Familiar with Requests and projects |
| Organizational Development: Knowledge of non-profit accounting and operating procedures |
| Other: Schlesinger match. Research and Resources |

What are your foundation's greatest strengths? (Ranked third)

| |
|---|
| Board and Volunteers: Dependable (same) volunteers when called upon. Strong, diverse, engaged board of directors that adhere to our mission and sense of community. Strong governance. Active board. BOD willing to put in many volunteer hours. Community members on board. |
| Community Support: Community building. Great network to work with. Our communications and networking with local nonprofits. Promoting education toward preserving our unique community. SUPPORTING COMMUNITY. Diversity of membership representation |
| Endowment: Great potential to grow the endowment fund. Ability to help fund projects and programs in the community |
| Partnerships: There are lots of attorneys, CPAs and financial planners who can be contacted to help. Partnership building |
| Receptivity: We are receptive to new ideas and approaches. Regional focus - 5 counties in our area, but open to all opportunities |
| Strategic Planning; We had a strategic plan when we organized and we have followed it. Realize importance of strategic planning. |
| Other: Work with all types of community organizations. Potential for growth. Strong Local Ties to the Community |

Survey Participants:

| |
|--|
| Whitefish Community Foundation |
| Hill County Community Foundation |
| Park County Community Foundation |
| Wise River Community Foundation |
| Powell County Foundation |
| Bozeman Area Community Foundation |
| Lewis and Clark County Community Foundation |
| F.A.I.R. Community Foundation |
| Powder River Community Endowment Fund |
| Nye Community Foundation (Nye, Montana, USA) |
| Red Lodge Area Community Foundation |
| Great Falls Area Community Foundation |
| Greater Polson Community Foundation |
| Greater Glendive Community Foundation |
| Sweet Grass Health and Wellness Foundation |
| Montana Community Foundation |
| Billings Community Foundation |
| Swan Valley CF |
| Tobacco Valley Community Foundation |
| Sunburst Community Foundation |
| Ruby Valley Community Foundation |
| Flathead Community Foundation |
| Anaconda Community Foundation |
| RCCF |
| Roy Endowment Fund |
| Seeley Lake Community Foundation |

| What is your position | | |
|--------------------------|------------------|----------------|
| Answer Options | Response Percent | Response Count |
| Board Member | 74.1% | 20 |
| Staff | 22.2% | 6 |
| Volunteer | 3.7% | 1 |
| <i>answered question</i> | | 27 |
| <i>skipped question</i> | | 1 |

If you are a staff member, what is your title?

| |
|-----------------------------|
| Executive Director/CEO (7) |
| Program Director (with CEO) |
| Administrative Coordinator |

| Did the board contribute to the responses of this survey? | | |
|---|------------------|----------------|
| Answer Options | Response Percent | Response Count |
| Yes | 43.5% | 10 |
| No | 30.4% | 7 |
| Partially | 26.1% | 6 |



| | |
|--------------------------|----|
| <i>answered question</i> | 23 |
| <i>skipped question</i> | 5 |

What year was your community foundation started?

| Year Established | # In Each Category |
|------------------|--------------------|
| 1988 | 1 |
| 1994 | 2 |
| 1996 | 1 |
| 1998 | 1 |
| 1999 | 2 |
| 2000 | 2 |
| 2004 | 1 |
| 2005 | 2 |
| 2006 | 2 |
| 2007 | 2 |
| 2008 | 2 |
| 2009 | 1 |
| 2011 | 1 |

Other: Our predecessor organization was the Russell Region Endowment Fund established in the early days of the Montana Community Foundation.

Does your community foundation have its own 501(c)3 status?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Yes | 69.6% | 16 |
| No | 30.4% | 6 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

How many separate "funds" do you have? (endowed or pass-through)

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| 1-3 | 65.2% | 15 |
| 3-6 | 4.3% | 1 |
| 6-10 | 3.7% | 2 |
| 10+ | 21.7% | 5 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

Do you manage donor advised funds?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Yes | 43.5% | 10 |
| No | 56.5% | 13 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |



If you do manage donor advised funds, how many funds do you have?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| 1-2 | 30.0% | 3 |
| 3-5 | 40.0% | 4 |
| 5-10 | 11.1% | 1 |
| 10-20 | 10.0% | 1 |
| Over 20 | 10.0% | 1 |
| <i>answered question</i> | | 10 |
| <i>skipped question</i> | | 18 |

If you do manage donor advised funds, is there a minimum size requirement to establish a donor advised funds? If yes, what is the minimum?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| No Minimum | 41.7% | 5 |
| Under \$3,000 | 0.0% | 0 |
| \$3,000 - \$5,000 | 16.7% | 2 |
| \$5,000- \$10,000 | 8.3% | 1 |
| \$10,000-\$20,000 | 0.0% | 0 |
| Over \$20,000 | 33.3% | 4 |
| <i>answered question</i> | | 12 |
| <i>skipped question</i> | | 16 |

If you have endowments, what is the approximate size of your total endowed assets?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Under \$100,000 | 36.8% | 7 |
| \$100,000-\$300,000 | 26.3% | 5 |
| \$300,000-500,000 | 15.8% | 3 |
| \$500,000-\$1,000,000 | 0.0% | 0 |
| \$1,000,000-\$5,000,000 | 15.8% | 3 |
| Over \$5,000,000 | 5.3% | 1 |
| <i>answered question</i> | | 19 |
| <i>skipped question</i> | | 9 |

If you have endowments, what percentage of your endowment are unrestricted funds?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Under 5% | 21.1% | 4 |
| 5-10% | 31.6% | 5 |
| 10-20% | 0.0% | 0 |
| 20-30% | 5.3% | 1 |
| 30-40% | 5.3% | 1 |
| Over 50% | 36.8% | 7 |
| <i>answered question</i> | | 19 |
| <i>skipped question</i> | | 9 |



What is your annual operating budget?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Under \$5,000 | 34.8% | 8 |
| \$5,000-\$25,000 | 34.8% | 8 |
| \$25,000-\$50,000 | 8.7% | 2 |
| \$50,000-\$100,000 | 8.7% | 2 |
| \$100,00-\$200,00 | 4.3% | 1 |
| Over \$200,000 | 8.7% | 2 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

What is your annual grant making budget?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Under \$5,000 | 22.7% | 5 |
| \$5,000-\$25,000 | 59.1% | 13 |
| \$25,000-\$50,000 | 4.5% | 1 |
| \$50,000-\$100,000 | 4.5% | 1 |
| \$100,000-\$200,000 | 0.0% | 0 |
| Over \$200,000 | 9.1% | 2 |
| <i>answered question</i> | | 22 |
| <i>skipped question</i> | | 6 |

How much of your total annual grant making is made from donor advised funds?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| None | 59.1% | 13 |
| Under 25% | 9.1% | 2 |
| 25%-50% | 0.0% | 0 |
| 50%-75% | 9.1% | 2 |
| Over 75% | 22.7% | 5 |
| <i>answered question</i> | | 22 |
| <i>skipped question</i> | | 6 |

How many board members do you have currently have?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| 2-5 | 8.7% | 2 |
| 6-10 | 60.9% | 14 |
| 11-15 | 26.1% | 6 |
| 15+ | 4.3% | 1 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

| How many standing board committees do you have? | | |
|---|------------------|----------------|
| Answer Options | Response Percent | Response Count |
| None | 26.1% | 6 |
| 1-2 | 39.1% | 9 |
| 3-4 | 17.4% | 4 |
| 5+ | 17.4% | 4 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

If you have board committees, please list your standing board committees.

| |
|---|
| Marketing, executive |
| Women's/Events Building Improvement Youth/Education Health/Emergency |
| Finance |
| Executive; marketing, fundraising, grants |
| Legacy |
| Scholarship brochure/newsletter |
| Executive, Finance, Grant Making, Gifted |
| GRANT COMMITTEE |
| 1.Finance/Internal Affairs (finances/investments, risk management, human resources, governance) 2.External Affairs (programming, community relations, marketing, fundraising) |
| Audit, Governance, Executive, Investment |
| Executive, Finance, Donor Development Marketing, Grants |
| Development Executive Awards Finance |
| Executive, Finance, Donor Development, Marketing, Grants |
| Fundraising Planned giving Investment/Financial Administrative Leadership Communication and Marketing Grant making |
| P/R Communications Bylaws/Structure Membership |
| Executive Committee; Investment Committee; Governance Committee; Grants Committee; Marketing Committee; Endowment Development Committee; Foundation Development(Patron Pass Club) Committee: Advisory Council |

| How often does your board meet? | | |
|---------------------------------|------------------|----------------|
| Answer Options | Response Percent | Response Count |
| Yearly | 0.0% | 0 |
| Quarterly | 13.0% | 3 |
| Monthly | 78.3% | 18 |
| Weekly | 0.0% | 0 |
| Other (please specify) | 8.7% | 2 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

| Does your community foundation have paid staff? (please select all that apply) | | |
|--|------------------|----------------|
| Answer Options | Response Percent | Response Count |
| No paid staff | 47.8% | 10 |



| | | |
|--|-------|-----------|
| Yes | 34.8% | 8 |
| Contract services only (bookkeeping, etc) | 17.4% | 4 |
| AmeriCorp VISTA volunteer for project work | 4.3% | 1 |
| Other (please specify) | 0.0% | 0 |
| <i>answered question</i> | | 21 |
| <i>skipped question</i> | | 5 |

| How many paid staff full-time equivalents do you have? | | |
|---|-------------------------|-----------------------|
| Answer Options | Response Percent | Response Count |
| 0 | 55.0% | 11 |
| <1 | 30.0% | 6 |
| 1 | 10.0% | 2 |
| 2 | 0.0% | 0 |
| 3 | 0.0% | 0 |
| 4 | 0.0% | 0 |
| 5+ | 5.0% | 1 |
| <i>answered question</i> | | 20 |
| <i>skipped question</i> | | 8 |

If you do have paid staff, what positions do you currently have?

| |
|---|
| Executive Director/CEO (6) |
| Administrative Assistant (3) |
| Program and Development Coordinator |
| Controller |
| Program Director (one organization has 2) |
| Contracted Administrative Coordinator |
| Communications Manager |
| Accountant |
| Planned giving coordinator |
| Contract Bookkeeper |
| *Note* One organization has the following positions listed above: CEO, Controller, 2 program directors, Communications Manager, Accountant |
| Note* One organization has the following positions listed above: Executive Director and Administrative Assistant and a contract Bookkeeper |

| If your staff is part-time, is it important to your organization to be able to increase the position to a larger FTE, or even full-time? | | |
|---|-------------------------|-----------------------|
| Answer Options | Response Percent | Response Count |
| Yes | 90.9% | 10 |
| No | 9.1% | 1 |
| <i>answered question</i> | | 11 |
| <i>skipped question</i> | | 17 |

When did your foundation begin having paid staff?



| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Unsure | 8.3% | 1 |
| Less than 6 months | 0.0% | 0 |
| 6 months -1 year | 0.0% | 0 |
| 1-2 years | 8.3% | 1 |
| 2-3 years | 25.0% | 3 |
| 3-5 years | 41.7% | 5 |
| 5-10 years | 8.3% | 1 |
| 10+ years | 8.3% | 1 |
| <i>answered question</i> | | 12 |
| <i>skipped question</i> | | 16 |

If you have paid staff, what sources of revenue underwrites the compensation for paid staff? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|-------------------------------|------------------|----------------|
| One or more foundation grants | 46.5% | 5 |
| Endowment revenues | 46.5% | 5 |
| Fundraising events | 54.6% | 6 |
| Restricted donor gifts | 27.3% | 3 |
| Other (please specify) | 36.4% | 4 |
| <i>answered question</i> | | 11 |
| <i>skipped question</i> | | 17 |

If your community foundation doesn't have paid staff, how important is it to be able to hire staff?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Not important | 36.4% | 4 |
| Somewhat important | 27.3% | 3 |
| Important | 27.3% | 3 |
| Very Important | 9.1% | 1 |
| Extremely Important | 0.0% | 0 |
| <i>answered question</i> | | 11 |
| <i>skipped question</i> | | 17 |

How would you rate the following activities in importance to fulfilling your mission?

| Answer Options | Very Important | Somewhat important | Not a priority | Not Part of our mission | Rating Average | Response Count |
|---|----------------|--------------------|----------------|-------------------------|----------------|----------------|
| Raise money for endowments | 19 | 3 | 1 | 0 | 3.78 | 23 |
| Raise money for grant making | 16 | 4 | 3 | 0 | 3.52 | 23 |
| Raise money for specific community projects | 12 | 9 | 2 | 0 | 3.43 | 23 |
| Help local donors to be philanthropic | 18 | 4 | 1 | 0 | 3.74 | 23 |
| Provide funding for local nonprofits | 18 | 3 | 2 | 0 | 3.70 | 23 |
| Keep local wealth/assets in the community permanently | 21 | 2 | 0 | 0 | 3.91 | 23 |

| | | | | | | |
|--|----|---|---|---|------|-----------|
| Address Community problems | 12 | 8 | 3 | 0 | 3.43 | 23 |
| Provide leadership for community projects and issues | 12 | 9 | 2 | 0 | 3.43 | 23 |
| Build capacity/infrastructure of local nonprofits | 9 | 8 | 2 | 4 | 2.96 | 23 |
| Provide advocacy on public policy issues | 2 | 6 | 9 | 6 | 2.17 | 23 |
| Other (please specify) | | | | | | 0 |
| <i>answered question</i> | | | | | | 23 |
| <i>skipped question</i> | | | | | | 5 |

Which of the following would be most helpful to accomplish your community foundations goals? (please rank...1 being most helpful and 9 being least helpful)

| Answer Options | 1 Most Helpful | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 Least Helpful | Rating Average | Response Count |
|--|----------------|---|---|---|---|---|---|---|-----------------|----------------|----------------|
| More money for your endowments | 6 | 3 | 2 | 0 | 1 | 2 | 0 | 1 | 1 | 2.87 | 15 |
| More money for immediate grant making | 2 | 5 | 3 | 1 | 1 | 0 | 2 | 3 | 0 | 4.00 | 17 |
| Information on community needs to guide grant making | 1 | 0 | 1 | 2 | 2 | 3 | 4 | 3 | 1 | 5.94 | 17 |
| More fundraising skills | 1 | 3 | 4 | 2 | 2 | 1 | 0 | 0 | 3 | 4.38 | 16 |
| More technical assistance and professional development | 1 | 0 | 5 | 1 | 4 | 0 | 4 | 2 | 0 | 4.94 | 18 |
| Paid staff | 1 | 2 | 1 | 4 | 4 | 3 | 0 | 1 | 3 | 5.11 | 19 |
| More active board members | 3 | 2 | 2 | 4 | 1 | 4 | 1 | 1 | 0 | 4.06 | 18 |
| Marketing and promotional materials | 2 | 3 | 0 | 1 | 3 | 3 | 3 | 3 | 1 | 5.11 | 18 |
| A plan for our future | 3 | 2 | 2 | 3 | 1 | 1 | 3 | 3 | 5 | 5.48 | 23 |
| Other (please specify) | | | | | | | | | | | 1 |
| <i>answered question</i> | | | | | | | | | | | 23 |
| <i>skipped question</i> | | | | | | | | | | | 5 |

What activities does your community foundation engage in currently? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|---|------------------|----------------|
| Community grantmaking | 87.0% | 20 |
| Raising money for an unrestricted endowment | 82.6% | 19 |
| Raising money for current grantmaking | 69.6% | 16 |
| Raising money for community projects | 47.8% | 11 |
| Promoting legacy giving (bequests)and/or planned giving | 69.6% | 16 |
| Educating donors about local needs | 47.8% | 11 |

| | | |
|---|-------|-----------|
| Promoting philanthropy for individuals in the community | 73.9% | 17 |
| Providing leadership for community projects | 47.8% | 11 |
| Engaging community members to address local issues | 34.8% | 8 |
| Working with local nonprofits to address community needs | 47.8% | 11 |
| Networking nonprofits to leverage resources, encourage collaboration and reduce duplication of programs | 43.5% | 10 |
| Assessing community needs | 47.8% | 11 |
| Creating social capital through promoting volunteersim and community engagement | 34.8% | 8 |
| Fostering advocacy to address local public policy issues | 13.0% | 3 |
| Other (please specify) | | 2 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

| What are your greatest challenges in fulfilling your mission? (please rate) | | | | | | | |
|---|-----------------------|------------------|-------------|----------------------|-----------------|-----|----------------|
| Answer Options | Extremely Challenging | Very Challenging | Challenging | Somewhat Challenging | Not A Challenge | N/A | Rating Average |
| Difficulties in recruiting board members | 4 | 6 | 4 | 5 | 4 | 0 | 2.96 |
| Lack of time on the part of board members or volunteers | 6 | 6 | 8 | 2 | 1 | 0 | 2.39 |
| Lack of paid staff | 4 | 3 | 4 | 6 | 2 | 4 | 2.95 |
| Lack of fundraising skills | 3 | 3 | 9 | 6 | 1 | 0 | 3.00 |
| Lack of grantmaking skills | 0 | 1 | 2 | 9 | 7 | 2 | 4.16 |
| Reluctance of board members to solicit planned gifts or bequests | 6 | 7 | 6 | 3 | 0 | 1 | 2.27 |
| Limited knowledge of community needs | 0 | 4 | 2 | 5 | 10 | 1 | 4.00 |
| Lack of a clear vision or mission | 0 | 2 | 3 | 5 | 13 | 0 | 4.26 |
| Lack of understanding about what the role of a | 1 | 2 | 3 | 4 | 12 | 1 | 4.09 |

| | | | | | | | |
|--|---|---|----|---|---|---|------|
| community foundation is Local nonprofits have a limited capacity to use grants well | 1 | 0 | 2 | 9 | 8 | 2 | 4.15 |
| Low visibility in the community | 4 | 7 | 6 | 4 | 2 | 0 | 2.70 |
| Difficulty explaining the purpose of a community foundation to prospective supporters or community leaders | 3 | 2 | 6 | 7 | 5 | 0 | 3.39 |
| Poor economic conditions | 3 | 2 | 10 | 4 | 3 | 1 | 3.09 |
| Unwillingness of local donors to give to endowments | 3 | 2 | 5 | 8 | 3 | 1 | 3.29 |
| Low level of community involvement | 4 | 2 | 5 | 7 | 3 | 1 | 3.14 |
| Other (please specify) | | | | | | | |
| <i>answered question 23</i> | | | | | | | |
| <i>skipped question 5</i> | | | | | | | |

What are your priorities for your development(fundraising)activities? (please rate)

| Answer Options | Extremely Important | Very Important | Important | Somewhat Important | Not a priority | N/A | Rating Average |
|--|---------------------|----------------|-----------|--------------------|----------------|-----|----------------|
| Growing an unrestricted endowment | 12 | 7 | 3 | 0 | 1 | 0 | 1.74 |
| Raising operating support | 9 | 7 | 4 | 1 | 1 | 0 | 2.00 |
| Funding specific community projects | 5 | 8 | 4 | 1 | 3 | 0 | 2.49 |
| Growing field of interest endowments (like youth, arts and culture, scholarships, etc) | 2 | 4 | 5 | 3 | 7 | 0 | 3.43 |
| Attracting new funds (donor advised, designated, etc) | 12 | 7 | 3 | 0 | 1 | 0 | 1.74 |
| Not currently engaged in any active fundraising | 0 | 3 | 2 | 0 | 0 | 10 | 2.40 |

What type of fundraising strategies do you utilize? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|---|------------------|----------------|
| Individual visits to prospective or current donors | 72.7% | 16 |
| Cultivating relationships with local financial professionals for referrals (estate planning attorneys CPAs) | 68.2% | 15 |
| Bequest program | 40.9% | 9 |
| Planned giving program | 45.6% | 10 |
| Major gift campaign | 9.1% | 2 |
| Annual appeal (e.g. fundraising letter) | 81.8% | 18 |
| Web-based appeals, via websites or social media | 54.5% | 12 |
| Fundraising events | 63.6% | 14 |
| Grant writing to solicit donations from other foundations | 45.5% | 10 |
| Internal solicitation from board members and volunteers(current and former) | 68.2% | 15 |
| Solicitation of gifts or sponsorships from local businesses or corporations | 54.5% | 12 |
| Solicitation of donations at community events, such as the county fair, all-school reunions, etc. | 36.4% | 8 |
| Sell annual memberships, sponsorships | 18.2% | 4 |
| Sell items or services such as cookbooks, T-shirts, commemorative tiles, etc.. | 4.5% | 1 |
| Other (please specify) | | 1 |
| <i>answered question</i> | | 22 |
| <i>skipped question</i> | | 6 |

What steps do you take to help deepen your community foundations relationship with your donors?

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| Hold an annual donor appreciation event (not a fundraiser) | 34.8% | 8 |
| Meet with donors individually to keep them informed of your community foundations activities | 34.8% | 8 |
| Call and thank donors when they make contributions | 52.2% | 12 |
| Send a hand-written thank you note when donors make a contribution | 91.3% | 21 |
| Send a newsletter | 60.9% | 14 |
| Send an annual report | 26.1% | 6 |
| Invite them to "friend" your community foundation on Facebook and post regularly to your Facebook page | 26.1% | 6 |
| We don't cultivate relationships with donors outside of sending a gift acknowledgment letter | 4.3% | 1 |
| Donor cultivation and stewardship | 26.1% | 6 |
| Other (please specify) | | 2 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

How do you involve your donors in your activities?

| Answer Options | Frequently | Sometimes | Rarely | Never | Rating Average | Response Count |
|--|------------|-----------|--------|-------|----------------|----------------|
| Educations seminars about philanthropy | 1 | 10 | 3 | 8 | 2.82 | 22 |
| Invite them on site visits | 1 | 4 | 5 | 8 | 3.11 | 18 |
| Involve them in volunteer activities | 3 | 8 | 6 | 3 | 2.46 | 20 |
| Other (please specify) | | | | | | 2 |
| <i>answered question</i> | | | | | | 23 |
| <i>skipped question</i> | | | | | | 5 |

How do you seek support from private, family or corporate funders in your geographic area? (select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| We do not seek this type of support | 17.4% | 4 |
| Donations to endowment fund(s) | 47.8% | 11 |
| Operating support | 58.5% | 13 |
| Sponsorships for fundraising events | 30.4% | 7 |
| Partner for capacity building programs | 30.4% | 7 |
| Partner for grantmaking | 21.7% | 6 |
| Participation on your community foundations board of directors, and/or grant committee | 43.6% | 10 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

How much did you grant in your last fiscal year?

| |
|-------------------------------------|
| \$2.3 million |
| 633,000 |
| 129,125 |
| 35,000 |
| 29,000 |
| 25,000 |
| 20,000 |
| ***15,000 |
| 13,900 |
| 12,400 |
| 11,625 |
| 10,000 |
| 6,000 |
| 5,000 |
| 4,600 |
| 3,000 |
| 1,800 |
| 500 |
| ***Two respondents gave this answer |

How do you award grants? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| Only through our restricted funds | 9.6% | 2 |
| Open solicitation to all local nonprofits | 85.7% | 18 |
| Focused grant making on specific community needs or topics | 9.5% | 2 |
| Support for major community projects | 23.8% | 5 |
| Limit grants to competitive applications with specific program areas, like youth | 14.3% | 3 |
| Other (please specify) | | 3 |
| answered question | | 21 |

If your grant making supports a strategy to address high-priority community needs, how do you gather information about those needs? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| General community knowledge | 91.7% | 11 |
| Use research data and statistical indicators available through federal, state or local agencies, universities or nonprofit organizations | 16.7% | 2 |
| Convene community members | 50.5% | 6 |
| Convene representatives of nonprofit organizations | 16.7% | 2 |
| Do community surveys or needs assessments | 25.0% | 3 |
| Other (please specify) | | 2 |
| answered question | | 12 |
| skipped question | | 16 |

What are your most challenging obstacles to effective grant making? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| lack of training for board members on strategic grant making, due diligence procedures, evaluation, etc. | 31.6% | 6 |
| Difficulty in saying no to poor requests or poorly run nonprofit organizations | 10.5% | 2 |
| Too many requests resulting in small grants | 21.1% | 4 |
| Too few 501(c)3 organizations in the local area to apply for grants or carry out programs | 10.5% | 2 |
| Inability of local nonprofits to prepare good grant applications | 31.6% | 6 |
| Limited capacity of local nonprofits/public agencies to provide good programs or use grants effectively | 15.8% | 3 |
| Insufficient grant money to make a significant impact | 73.7% | 13 |
| Too much reactive grant making, i.e. we haven't created a grant program focusing on the greatest needs in the community, but respond to competitive requests | 31.6% | 6 |
| Lack of grant requests | 15.8% | 3 |
| Other (please specify) | | 2 |
| answered question | | 19 |
| skipped question | | 8 |

Which of the following leadership activities do you engage in? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| Convening community members or groups to do projects, solve problems or discuss issues | 34.8% | 8 |
| Lead fundraising efforts for major projects | 8.7% | 2 |
| Fiscal sponsorships | 26.1% | 6 |
| Capacity building for local nonprofits or community groups | 34.8% | 8 |
| Facilitating a community planning or visioning process | 26.1% | 6 |
| Leadership development | 17.4% | 4 |
| Nonprofit networking | 43.6% | 10 |
| Advocacy/education about public policy issues | 17.4% | 4 |
| None | 17.4% | 4 |
| Other (please specify) | | 1 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

Has your community foundation been involved in collaborative leadership activities with any of the following? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|---|------------------|----------------|
| Nonprofit organizations (other than a grantor relationship) | 64.7% | 11 |
| Service clubs and civic organizations | 52.9% | 9 |
| Local schools and other educational institutions | 41.2% | 7 |
| Family, private or corporate foundations | 41.2% | 7 |
| Local business and corporations | 29.4% | 5 |
| Local business associations (chamber of commerce, CPAs, bar association, etc) | 29.4% | 5 |
| Local or county government | 52.9% | 9 |
| Other (please specify) | | 1 |
| <i>answered question</i> | | 17 |
| <i>skipped question</i> | | 11 |

How Important does your board regard increasing your community foundation's collaborations with community partners?

| Answer Options | Response Percent | Response Count |
|--------------------------|------------------|----------------|
| Very Important | 47.8% | 11 |
| Important | 26.1% | 6 |
| Somewhat Important | 21.7% | 5 |
| Not Important | 4.3% | 1 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

If funding was available to build the capacity of your community foundation, what would be your priorities? (please rank..1 being a high priority and 5 being a low priority)

| Answer Options | 1 High Priority | 2 | 3 | 4 | 5 | 6 Low Priority | Rating Average | Response Count |
|--|-----------------|---|---|---|---|----------------|----------------|----------------|
| Training workshops | 2 | 2 | 4 | 7 | 0 | 2 | 3.41 | 17 |
| Consultant assistance | 1 | 3 | 5 | 1 | 4 | 3 | 3.76 | 17 |
| Financial assistance for hiring staff | 8 | 3 | 1 | 2 | 2 | 2 | 2.61 | 18 |
| Challenge grants to build assets | 9 | 4 | 3 | 3 | 1 | 1 | 2.33 | 21 |
| Strategic Planning | 1 | 5 | 2 | 2 | 6 | 4 | 3.95 | 20 |
| Networking opportunities, attending conferences, etc.. | 2 | 2 | 4 | 3 | 4 | 5 | 4.0 | 20 |
| Other (please specify) | | | | | | | | 3 |
| <i>answered question</i> | | | | | | | | 23 |
| <i>skipped question</i> | | | | | | | | 5 |

How would you be willing to participate in the broader community foundation sector in Montana? (please select all that apply)

| Answer Options | Response Percent | Response Count |
|--|------------------|----------------|
| Participate in annual training workshops | 87.0% | 20 |
| Participate in networking events | 55.5% | 13 |
| Mentor other local community foundations | 34.8% | 8 |
| Attend statewide convenings for community foundations | 65.2% | 15 |
| Participate in the Google Group for Montana Community Foundations | 78.3% | 18 |
| Participate in a campaign to preserve the Endowment Tax Credit or other philanthropic issues | 47.9% | 11 |
| Help with planning or running events or trainings | 26.1% | 6 |
| Volunteer to conduct trainings or participate on a panel at a workshop | 34.8% | 8 |
| We aren't interested in participating in the sector-wide activities right now | 4.3% | 1 |
| Other (please specify) | | 0 |
| <i>answered question</i> | | 23 |
| <i>skipped question</i> | | 5 |

If training workshops are a priority, what types of training do you need?

| |
|--|
| Fundraising: Methods of solicitation, Developing donors, PLANNED GIVING, how to approach people about endowments, fund development plans, fundraising (x3) |
| Board training: Board development, Nonprofit basics for new board members, more involvement by Board members |
| Grants: Grant writing and grant seeking |
| Planned Gifts: Education on Charitable Instruments/Charitable Assets/Planned Gifts, Planned Giving, MT TAX CREDIT |
| Marketing and Communications: How to make the TVCF more known, Marketing (3 times), Marketing assistance, how to update & maintain website, FaceBook |
| Grant making: Grant making best practices, Strategic Grant making |
| Accounting: Accounting Practices for Community Foundations Asset/Investment Management. Interested in bringing in a trainer to go over financial reports so the Grants Committee better |

| |
|---|
| understands them. |
| Other: Increasing internal capacity, Partnership Building, strategic planning, |

If consultant assistance is a priority, what type of consulting do you need?

| |
|--|
| Planned giving: Planned giving (x3), planned giving liability analysis, MT Tax credit. |
| Marketing: Marketing assistance, social media, Training on how to reach the public with news of our foundation and to work to get our name better known, marketing and building community awareness of what we do |
| Boards: Board engagement, |
| Fundraising: Securing grants from corporations, foundations, etc, fund development plan - best way to use limited dollars, fundraising for operations. Looking at a consultant that has the experience with building an up and coming community foundation and has a proven record of building relationships with big donors to open donor advised funds. This is a growing area for us. |
| Other: Building design specs for remodel, examples of articles for prospective donors |

Do you have any comments regarding this survey or suggestions how resources across the state can support and strengthen MT local community foundations?

| |
|--|
| If you're going to have us do this again, make it shorter |
| Most importantly, collaborate and pool financial resources without restriction (other than the goal of developing local community foundations). Use the Montana Community Foundation to execute the program because of our experience, professional staff and wide reach. |
| One major asset in the Flathead Valley is the Nonprofit Development Partnership (npdp.org). The Nonprofit Development Partnership is involved in community capacity building through monthly educational workshops, monthly educational e-Newsletters, and monthly networking. The Flathead Community Foundation partners with them to meeting the non-grant/funding needs of nonprofits. We provide the majority of funding for the Nonprofit Development Partnership through one of our Donor-Advised Funds and host an endowment fund for the Nonprofit Development Partnership. In other areas of the state, local community foundations can support the development of a similar type organization. |