

Strengthening Montana's Community Foundations Collaborative
***Draft Summary of Strategic Direction, Goals and Plan for 2012**
Developed on October 11 and 12, 2011
Mountain Sky Guest Ranch
Facilitated by Peggy M. Owens, CFRE

PURPOSE OF STRENGTHENING MONTANA'S COMMUNITY FOUNDATIONS

COLLABORATIVE: Work collaboratively to develop opportunities and expanded funding to build the capacity of Montana's Community Foundations so they can develop community assets and effectively utilize available resources.

BACKGROUND ON PROCESS AND PARTICIPANTS

The Strengthening Montana's Community Foundations Collaborative was initiated by Tawnya Rupe from Mountain Sky Guest Ranch and Kelly Bruggeman from First Interstate Foundation. They organized a meeting of funders and nonprofit resource leaders in April 2011. During that all-day session, the group examined the capacity of Montana's community foundations (CFs) and what resources were currently available to support them. There was discussion about how the group could support capacity building of community foundations. The primary recommendation from the meetings was that the group develop a plan to strengthen Montana's community foundation sector.

Another recommendation of the April meeting was to obtain more data through an online survey of all the sixty-seven community foundations in the state. The final recommendation was to add another day to the fall convening of the CFs scheduled for October 2011. Both of these recommendations were implemented before the planning session.

This plan was created on October 11 and 12. Those participating in the October planning session are listed below. Most of this group also attended the CF convening that was held the three days before, allowing ample opportunities to network with CF representatives. There was also a facilitated "listening session" with CFs at the end of the three-day conference during which LCF representatives discussed their vision for Montana's community foundations and their priorities for building organizational capacity.

Funders were invited to observe the groups of CFs as they developed their ideas. Hearing the reports from each group of CF representatives gave the planning team insight into the vision and needs of Community Foundations in Montana. The data from the online survey and the "listening session" were considered throughout the planning session.

This planning session was made possible by the continued support of the Mountain Sky Guest Ranch Fund and First Interstate Foundation.

Name of Participant in Planning Session	Organization(s) Represented	Title
Cathy Cooney	Montana Community Foundation	Program Director
Bill Pratt	Big Sky Institute	Projects Coordinator
Mary Stranahan	High Stakes Foundation & Lower Flathead Valley Community Fdn	Funder & Board member
Mindie Reule	Philanthropy Northwest	Program Manager
Kelly Bruggeman	First Interstate Foundation	Vice President
Tawnya Rupe	Arthur M. Blank Family Foundation & Park County Community Foundation	Fund director for Mountain Sky Guest Ranch Fund, Board member Park County Community Foundation
Linda Reed	Montana Community Foundation	Executive Director
Dan Clark	Montana Community Foundation & MSUGovernment Center	Board member of MCF on the LCF committee. Director of Local Government Center
Michael Schechtman	Big Sky Institute	Executive Director
Dawn McGee	High Stakes Foundation	Executive Director
Bonnie Satchetello-Sawyer	Charlotte Martin Foundation and hopa mountain	Board Member Executive Director
Liz Moore	Montana Nonprofit Association	Executive Director

Strengthening Montana's Community Foundations

STRATEGIC DIRECTION AND GOALS

Philanthropic: Montana's Community Foundations serve as a catalyst for local philanthropy. They are positioned to capture the intergenerational transfer of wealth with fundraising programs in place and diversified sources of funding.

Goal 1: Community Foundations, professional advisors and public officials are aware of the intergenerational transfer of wealth in Montana

Goal 2: Advocate for the renewal of the Montana State Endowment Tax Credit and encourage the use of the credit by donors.

Goal 3: Build the financial assets of Montana's Community Foundations

Community Leadership: Community Foundations help Montana communities discover what they can become by convening members around common goals, supporting collaboration among local nonprofits and promoting community partnerships and leadership.

Goal 1: Create and support a process that engages CFs in a significant community engagement effort, keeping in mind that investment follows vision

Goal 2: Develop the facilitation and leadership skills of community foundation staff and board volunteers for community foundations interested in strategic grant making, community indicators projects and other leadership activities.

Goal 3: Community Foundations steward community resources and build community assets to strategically address issues and opportunities.

Goal 4: Develop a recognition program for CFs who engage in community leadership.

Networking: Montana's Community Foundations are connected, working together on project ideas and positioned to maximize funding opportunities. Their association uses peer networks and makes the most of available resources.

Goal 1: A fully funded "neutral" position is available for three years to create a structure that facilitates community foundation networking and collaboration and allows the development of an external brand.

Goal 2: Community foundations are engaged with each other and with other organizations working toward common goals.

Goal 3: Community foundations successfully engage state and local partners.

Awareness: The community is aware of its local foundation and views it as an integral part of the community, a respected and trusted resource.

Goal 1: CFs have a common brand that showcases the uniqueness of community foundations and their role as stewards and leaders.

Goal 2: CFs conduct a marketing campaign to focus on financial and legal professionals who work with prospective donors and are an important source of referrals.

Human Resources: Montana's Community Foundations have the professional staff and committed volunteers they need to be successful.

Goal 1: Teach CFs about available human resources and help them access them, e.g. Americorps, VISTA and RSVP.

Goal 2: Develop a CF leadership program for prospective executive staff and key volunteers.

Goal 3: Continue a suite of training options, e.g. in-person meetings, conferences, webinars.

