



Vision Document

Adopted November 13, 2009

Mission

The Bozeman Area Community Foundation's mission is to enhance the present and future quality of life and natural resources of our community. The Foundation serves donors by maximizing the impact and flexibility of their charitable intentions through established funds. For local nonprofit organizations, the Foundation identifies current and emerging issues in the local community and offers a viable funding source, education, and support. As well, the Foundation administers an annual grant cycle and builds and manages endowments on behalf of local nonprofit organizations.

History

The Bozeman Area Community Foundation was formed as a 501(c)3 nonprofit foundation in 1998 by a volunteer board of directors. With a goal to maintain a minimal overhead (1% or less of assets), the Foundation offered financial services for donors to give to local nonprofit organizations. The Foundation also held and managed endowments on behalf of a few local nonprofit organizations. Originally known as The Planned Giving Foundation of Montana, the name was changed to the Bozeman Area Community Foundation in late 2002 to better describe the Foundation's expanding mission to serve local nonprofit organizations. Beginning in 2008, the Foundation embarked on a strategic planning process to strengthen the Foundation and enhance its role to meet the area's growing population and the evolving needs of community donors and grantees.

From 1999 through 2009, the Foundation distributed approximately \$93,000 in grants to more than 30 local nonprofit organizations.

Vision

The Bozeman Area Community Foundation visualizes a community where local nonprofit organizations are equipped to address the needs of the community, and donors' ideas, values, initiatives, and generosity support a thriving, responsible community. As the local philanthropic facilitator, the Foundation strives to be a respected and trusted institution in the community. By pursuing innovative, charitable activities that provide leadership, identify community needs, and galvanize resources; the Foundation would be recognized as the leading community provider.

To realize this vision, the Foundation promises to:

- Seek, invest, and manage donor funds responsibly to provide growth, preserve capital, and create income for grant making.
- Create and encourage ways of perpetual giving to meet the philanthropic and financial goals of a broad spectrum of donors.
- Be an effective steward of philanthropic assets for the local community.
- Offer donors, prospects and local nonprofit organizations programs and services for information exchange, capacity building, donor education, resource sharing, and others.
- Anticipate, identify, and address real community needs that are new, unmet, or not widely recognized.
- Foster understanding and cooperation among diverse cultural, ethnic, and socioeconomic groups.

Values and Core Beliefs

As a facilitator, the Foundation works to raise the level of philanthropy directed to local nonprofit organizations through collaboration, rather than competition with other grant makers and nonprofit organizations.

The Foundation seeks to build a caring, understanding, and compassionate community through good stewardship, high ethical standards and transparency.

The integrity of the Foundation's staff, board, and donors and local nonprofit organizations and their constituents are valued.

The Foundation works to stay in compliance with all laws and regulations, and the Foundation's directors and officers pledge to avoid conflicts of interest.

The Foundation does not engage in political activities and does not discriminate on the basis of race, gender, creed, religion or ethnic heritage.

Geographic Area

"Local nonprofit organization" includes 501(c)3 organizations serving the cities of Bozeman, Belgrade, Manhattan, Livingston, and Big Sky and the rural communities between. The Foundation works with donors from many areas who chose to benefit these local communities.