

One Valley Community Foundation

2020 Annual Report



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A Letter from the Executive Director and Board President

After nearly six months of visioning, mapping, and debating, the Bozeman Area Community Foundation concluded a long planned and much anticipated rebranding exercise in February of 2020. While the chosen name, “One Valley Community Foundation,” was selected by our board and staff because it evoked this special place we get to serve—it was also aspirational and forward looking.

It has proven to be both of these things and more. In the year that has unfolded since, our name has also become a mantra, a touchstone that has given us strength and reminded us of our purpose. Amid the dual crisis of a global pandemic and a national reckoning with systemic racism, our neighbors and colleagues in communities throughout Gallatin County faced tremendous challenges. But, as One Valley, we responded, together.

When we issued a call to action, donors and philanthropic partners from around the region committed to making sure valuable services were available, allowing us to provide financial resources to local nonprofits through our Southwest Montana COVID-19 Response Fund almost immediately after stay-at-home orders were implemented. A particular focus for this fund was to support those disproportionately affected by COVID-19, including community members of color, people with disabilities, seniors, veterans and others who are experiencing disparate health impacts.

When these overwhelming national challenges were compounded locally by a fire in the Bridger Foothills near Bozeman that destroyed homes and farms, we came together again and dug deeper to prove that we really are One Valley. Before the smoke had cleared, community members from across the country generously invested in our Bridger Foothills Fire Relief Fund. This fund provided shelter for families and livestock, financial support to rebuild, and much needed emotional and mental health resources for those most impacted.

The generosity of time, talent and financial support within Gallatin County continues to demonstrate that philanthropy is an intrinsic value in our region. Despite a year where much has looked different, we saw the deep desire from our community to connect with one another. We saw our community rally around those in need, connect over meaningful causes, and focus on the positive impact we could create by coming together during initiatives like Give Big.

You will see in this annual report that while the global pandemic has impacted much of our work, it has not been the sole focus. One Valley Community Foundation has engaged in a spectrum of work this year to support diverse needs and opportunities. Most importantly, we’ve done this work together. Thank you for all that has been made possible through your critical support. We look forward to continuing our work together, because strong, vibrant communities don’t happen by accident.

In gratitude,



Bridget Wilkinson

Bridget Wilkinson,
Executive Director



Jennifer Lammers

Jennifer Lammers,
Board President

 **Meet the team on page 11.**

As Gallatin County's Community Foundation, we help maintain what makes this county special and this allows us to imagine the possibilities for an even better future.

By assisting other nonprofits, connecting donors and engaged community members with causes that are meaningful to them, and gathering people to discuss important issues, we help maintain what makes this Valley special and allow us to imagine the possibilities for an even better future. One Valley Community Foundation, formerly known as the Bozeman Area Community Foundation, has been providing support for donors, nonprofits and community leaders since 1998.

How We Do Our Work

WE INSPIRE IMPACTFUL GIVING BY...

Connecting donors with effective organizations:

Providing one-on-one donor education and support to reach specific goals.

Administering donor advised funds and other giving tools for individuals, families and businesses.

Helping community members build their legacy through strategic giving.

Being a conduit for resources by coordinating and pooling charitable funds to address larger needs through:

Give Big; One Valley's annual day of giving, that has raised more than \$6 million in just six years for nonprofit organizations throughout Gallatin County.

Broader community funds that support regional issues such as education or supporting local journalism.

Funds to support specific nonprofit organizations.

Stewarding giving in times of crisis through funds that are hosted in partnership with Greater Gallatin United Way, such as:

Southwest Montana COVID-19 Response Fund to support emergency financial assistance, mental and behavioral health, childcare grants, and emerging needs grants.

Bridger Foothills Fire Relief Fund to streamline the allocation of funds to individuals and families impacted by the recent fire, directing support to organizations responding to the immediate emergency, and serving the community in the months that followed.

WE STRENGTHEN THE LOCAL NONPROFIT SECTOR BY...

Providing high-quality training for nonprofit professionals and boards such as:

Nonprofit Café: Free monthly educational and collaborative gathering for all nonprofit leaders to learn best practices of the nonprofit sector.

Board Launch: Four-part training series designed to prepare nonprofit board members for service and set them up to be informed and engaged leaders.

Executive Director Roundtable Conversations: Bi-weekly gathering facilitated to provide space for nonprofit executive directors to connect, to learn from their peers, and to share ideas and challenges they are facing.

Championing the work of other nonprofits by supporting them through education and funding opportunities such as:

Annual Grant Cycle: Grantmaking from our Better Together Fund to support emerging needs in Gallatin County.

Youth Giving Project: Program to teach middle school and high school students about the grantmaking process and empowering them to grant funds to youth-led initiatives in their communities.

Facilitating the distribution of emergency reliefs funds: Funds such as the Southwest Montana COVID-19 Response Fund or our Bridger Foothills Fire Relief Fund that are providing critical support to nonprofits on the frontlines of these emergencies.

WE UNITE ORGANIZATIONS, GOVERNMENTS, AND CITIZENS IN THE GALLATIN VALLEY BY...

Gathering voices together to identify issues and needs and work toward results through initiatives like:

A Seat at the Table: A one-day, county-wide community initiative to engage residents in discussing ways we can continue to strengthen our community.

Regional Housing Council: An initiative to bring together diverse key stakeholders to address the unique and pressing challenges of affordable housing in Gallatin County.

Bozeman/Gallatin Complete Count Committee for the U.S. Census: To support outreach to increase engagement in the recent census.

If you are a donor, a nonprofit leader, a government official, or a passionate community member – you are part of One Valley.

Since 1998, the One Valley Community Foundation has galvanized more than \$6.9 million for more than 200 local nonprofits.

 **More information about some of our programs is on page 6.**



Family Promise – Southwest Montana
COVID-19 Response Fund Grantee



Peg Rifleman and Jonathan Distad, Founding Partners of Zinovo

Stories of Impact

Community Leadership Spotlight: One Valley + Greater Gallatin United Way

In March 2020, One Valley Community Foundation and Greater Gallatin United Way partnered to launch the collaborative Southwest Montana COVID-19 Response Fund in response to the growing global pandemic. Over the next year, our organizations learned how to work closely to leverage our individual organizational strengths to better meet the growing community needs. As a result, in September 2020, our organizations were well positioned to meet yet another community crisis, the Bridger Foothills Fire. Thanks to a partnership that had not existed at the start of 2020, our organizations leveraged our social, political and financial capital to address critical needs in our region, together, throughout the year. In 2020, One Valley and United Way raised and distributed nearly \$570,000 for the Southwest Montana COVID-19 Response Fund and \$400,000 for the Bridger Foothills Fire Relief Fund. “Together as a team of two high-impact philanthropic organizations, we were able to connect with more donors, more community partners, and create more positive impact to improve lives during the pandemic and the Bridger Foothills Fire than either one of our organizations could have done alone,” said Danica Jamison, President and CEO of Greater Gallatin United Way. “It has been hard work and many long hours, but it is a real joy to get to work together.”

Donor Spotlight: Zinovo Gives Donor Advised Fund

Zinovo is a growing tech company based in Bozeman. In 2020, the company set up a corporate advised fund at the Community Foundation to support Zinovo’s long-term giving goals to communities throughout Gallatin County. “It was simple to set up with a single initial donation to create our company’s fund,” said Peg Rifleman, Founding Partner of Zinovo with Jonathan Distad. “Our future donations to One Valley have long-term goals that will have an exponential impact for years to come as we continue to grant out dollars on behalf of our company.” Distad echoed that thought. “As the needs of the region change, our company has a fund that can adapt to those needs,” he said. “One Valley takes care of all of our administrative needs while our company gets to enjoy the fun parts of giving.”



[One Valley] Community Foundation has been an amazing resource for MTREP.

— HANNAH CORTEZ, GRANT CONSULTANT
MONTANA RACIAL EQUITY PROJECT

Photo Credit: Montana Racial Equity Project

Stories of Impact

Grantee Spotlight: Montana Racial Equity Project

The Montana Racial Equity Project (MTREP) is a Bozeman-based nonprofit that advocates equity and justice for historically marginalized, disenfranchised, and oppressed peoples across Montana. MTREP educates, trains, and activates organizers, individuals, groups, organizations, institutions, and businesses to invest in interrupting racism, bigotry, and prejudice whenever encountered. As the only Black-led racial and social justice organization in the state, MTREP is dedicated to lifting the voices and elevating the agency of BIPOC (Black, Indigenous, and people of color) in every aspect of their work!

At One Valley, we support nonprofit organizations like MTREP in a variety of ways - from capacity building programming to grant funding. This year, the Montana Racial Equity Project was a grant recipient of the Southwest Montana COVID-19 Response Fund to support their COVID-19 Crisis Fund. This fund distributed emergency funds to identified populations that were significantly impacted by COVID-19 including BIPOC, LGBTQIA+, persons with disabilities, and undocumented persons who experienced financial crisis due to the coronavirus pandemic.

As a grant recipient, MTREP was able to provide financial assistance to those in need for rent, utilities, medication, school costs, food, and many other basic needs that we so often take for granted. In addition to being a One Valley grantee, MTREP is a participant in our annual Give Big initiative and Executive Director Judith Heilman was a presenter for our Nonprofit Café session on “Board of Directors Role in Diversity, Equity, and Inclusion.” Judith is also a participant in our bi-weekly Executive Director Roundtable program that provides a space for nonprofit executive directors to connect, learn from their peers, and share ideas and challenges they are facing.

“One Valley has been an amazing resource for MTREP,” said Hannah Cortez, Grant Consultant for MTREP “Not only as a grant funder, but for the opportunities they have helped create through Give Big. MTREP has gained access to unrestricted funding, built relationships with local businesses, and raised community awareness about their organization and programs which has been a game-changer for their growth.”

Programs

When the pandemic began, One Valley quickly pivoted our nonprofit and donor programming to be 100% online and COVID-19 safe.

This allowed our team to be creative and try new styles of programming, while simultaneously reaching more nonprofit leaders who could easily log into our programs via Zoom from their communities throughout Gallatin County. In the midst of a challenging year, we were overwhelmed by the community's generosity from our Give Big annual giving day to contributions to our new emergency response funds.



Give Big Celebration in Belgrade, MT in 2019

Give Big

Hosted by One Valley Community Foundation since its inception in 2015, Give Big Gallatin Valley is a 24-hour celebration of giving to connect generous community members with causes they care about most and raise important, unrestricted funding for nonprofits serving Gallatin County. The goal is simple - inspire our people to come together, show their pride in their communities, and contribute to support the life-changing work of local nonprofit organizations in Gallatin County. In just six years, our community has raised nearly \$6 million in unrestricted funding through 42,257 gifts during Give Big. In 2020 alone, Give Big brought 5,782 community members together to raise more than \$1.8 million in just 24-hours for 195 local nonprofits. One Day. One Goal. One Valley.

Nonprofit Café

This free educational and collaborative gathering for all nonprofit leaders and board members is a monthly program featuring a speaker who presents on nonprofit best practices. In March 2020, we pivoted from in-person monthly gatherings to hosting these workshops via Zoom. We shifted our topics to reflect the urgent needs of nonprofits during the pandemic and to help address questions of racial equity. This year, our nonprofits learned about topics like HR compliance during the pandemic, equity in the board room, federal COVID-19 relief funding, and how to pivot their fundraising to topics on self-care and resilience. On average, we had 75 nonprofit leaders attending these sessions this year.

Executive Director Roundtable

Prior to 2020, this roundtable was hosted every month. When the pandemic hit, nonprofit leaders asked us to bring them together every Friday via Zoom to receive support from their peers. This gathering is facilitated by One Valley to provide space for nonprofit executive directors to connect, to learn from their peers, and to share ideas and challenges they are facing. This roundtable provides space for leaders to share their most pressing issues and get feedback from their peers on particular challenges. For example, the nonprofit leaders shared advice on how they are supporting themselves and their staff through the challenges of COVID-19. Over time, this trust has fostered creative partnerships between organizations and allowed our nonprofit leaders to feel supported in their roles.



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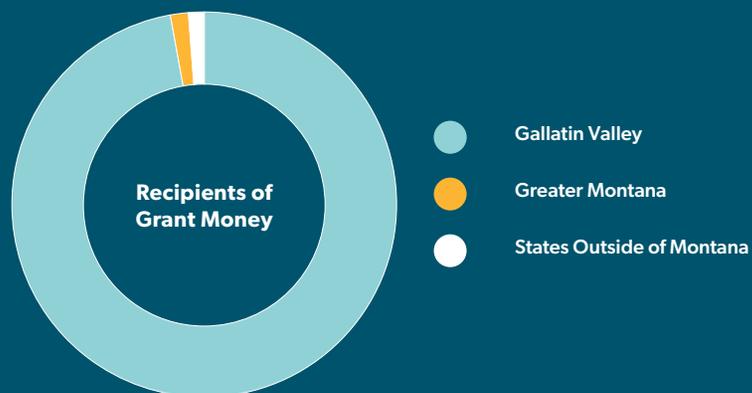
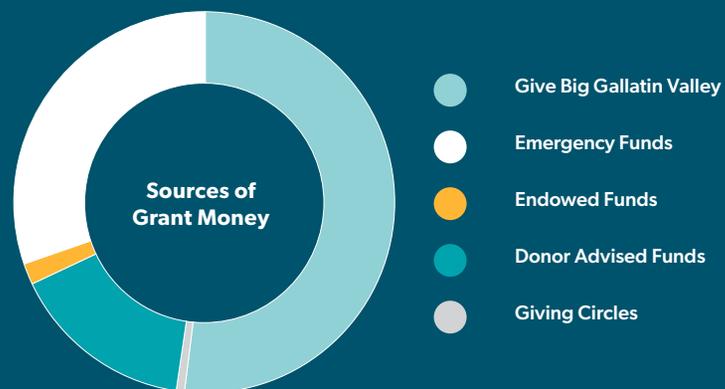
We believe in the power of all people to make a difference in their communities.

— BRIDGET WILKINSON, EXECUTIVE DIRECTOR,
ONE VALLEY COMMUNITY FOUNDATION

One Valley Giving Impact: How You Gave

TOTAL MONEY SENT OUT THROUGH ONE VALLEY IN 2020

\$3,220,850



GIVE BIG

\$1,670,000

GIVING CIRCLES

\$49,850

DONOR ADVISED FUNDS

\$504,785

ENDOWED FUNDS

\$55,969

EMERGENCY FUNDS – in partnership with GGUW

\$568,357

For the Southwest Montana COVID-19 Response Fund.

\$402,385

For the Bridger Foothills Fire Relief Fund.



Financials

ASSETS UNDER MANAGEMENT

ENDOWED AND NON-ENDOWED DONOR CHARITABLE FUNDS MANAGED BY ONE VALLEY

\$44,663,896

TOTAL REVENUE

\$46,142,419*

EXPENSES

\$3,163,430

NET INCOME

\$42,978,989*

In 2020, One Valley began its year in a strong financial position. This allowed the Foundation to be responsive to the significant community need due to the multiple crises our region faced: COVID-19, the Bridger Foothills Fire, and the racial reckoning after the murder of George Floyd. When community need was greatest, One Valley was ready to address them by helping distribute more than \$2.76 million to organizations and community members who needed it most.

Since 1998, One Valley Community Foundation has worked to build a strong financial and operational infrastructure to help us scale our work. After a thorough review of our policies, procedures and practices, we received a national accreditation through the Council on Foundations. We invested in our internal capacity to support financial best practices by hiring a Director of Finance and Operations, as well as an Administrative Assistant. With our enhanced staffing, growing programmatic impact and strong infrastructure, One Valley is in a great position to grow the financial resources we manage.

At the close of 2020, we took an enormous step forward. One Valley entered into a new and important strategic relationship with a local philanthropic family, growing our assets under management from \$1.6 million to \$44.6 million. While this family could have set up their own private foundation or even chosen another national provider for their donor advised fund, they selected One Valley Community Foundation as their philanthropic partner to help them manage and deploy these resources to address some of our region's most pressing needs.

*Roughly \$43,000,000 of total revenue and net income are a result of the new donor partnership noted above. These funds are held in a charitable fund and are not part of One Valley's operational dollars, less a modest management fee.



Looking Forward

Our region is growing quickly, and the needs of our community are changing. We know that strong, vibrant communities don't happen by accident. They require each of us to invest in this place that we call home. We're excited to do this work ahead alongside you. Because we're simply better, together.



We build community, one conversation at a time.

As we prepare for what comes next, we are hopeful for our community. Over the next 12 months, One Valley will:

- Focus on addressing housing affordability in our region through our A Seat at the Table conversation initiative and bringing together diverse stakeholders to address issues on a regional level.
- Continue to be committed to advancing racial justice and building a more equitable future for our region by using our voice, influence, programs, and initiatives to help end racial disparities. Our goal is not to go back to the way things were before, but to work together to build a new normal where everyone has an equal opportunity to live, work, and thrive.
- Press on to support COVID-19 response efforts. While we are seeing signs of hope, One Valley knows that individuals in our region are still suffering the effects of this global pandemic and we will continue to support our community until everyone is safe and healthy.

Because strong, vibrant communities don't happen by accident.

ONE VALLEY COMMUNITY FOUNDATION



Meet The Team



STAFF:

- 01. Bridget Wilkinson**
Executive Director
- 02. Jennifer Owens**
Director of Finance and Operations
- 03. Jill Ellwood**
Nonprofit Programming and Relations Manager
- 04. Tanya Andreasen**
Community Engagement Manager

05. Jane Stroh
Administrative Assistant

BOARD:

- 06. Jennifer Lammers, President**
Consultant, Philanthropy Hub
- 07. Jenifer Schimbano, Vice President**
Vice President of Client Relations, Blackmore Group, LLC
- 08. Eric Van Steenburg, Vice President**
Assistant Professor of Marketing, Montana State University

09. Jonathan Distad, Vice President
CEO, Zinovo and Blackford

10. Kristin Taylor, Secretary
Parent & Engaged Community Member

11. Lisa Prunty, Treasurer
Owner, By the Books Financial Services, CPA

12. Brea Bauer
CPA, Anderson ZurMuehlen & Co.

13. Gene Townsend
Former Mayor of Three Forks

14. Courtney Foster
Broker, Owner Referred Realty Group

15. Charlie Avis
Product Manager for onXmaps, Inc.

16. Cassidy Wendell
Community Builder/Founder of #GIRLGETAFTERIT



This has been an extraordinary year – we could not have done it without you.

Thank you for being our partners in this work.