

2021

One Valley Community Foundation
Annual Report



One Valley
COMMUNITY FOUNDATION

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A Letter from the Board Chair and the President & CEO

On behalf of those who support One Valley Community Foundation, we are honored to share our 2021 annual report with you. This year has been like none other.

We granted a record-breaking \$2.39 million to organizations doing critical work during unprecedented times. The generosity of our donors, fund holders and partners surpassed our expectations and gave us the opportunity to give more to those who needed it most. Additionally, together in one day in May, we inspired thousands of community members to find a cause they cared about and collectively raised nearly \$2.7 million for 210 nonprofits during One Valley's Give Big Gallatin Valley.

The strength of our relationships with public agencies, corporations and other nonprofits supported our work this year. In order to help our decision makers throughout Gallatin County stay informed on our region's most pressing issue of housing we released a comprehensive and easy-to-read Regional Housing Study in partnership with Future West. This study highlights the escalating costs of housing to purchase or rent in Gallatin County, describes a county-wide housing shortage, and illustrates how the costs of housing are not in alignment with wage growth. It also provides ideas meant to catalyze the region to communicate, collaborate and develop coordinated solutions to the housing needs of those who live, work and do business in Gallatin County.

Building upon the success of our Regional Housing Study, we hosted a second round of county-wide community conversations through our A Seat at the Table initiative in October. Community members throughout Gallatin County met in small conversations to discuss housing and explore solutions, together. Data from those conversations will be presented to City and County leaders to amplify our neighbors' voices.

While the pandemic is not yet behind us, our future has never been clearer. We have a bold vision to address the issues facing our community with the intent of making the greatest positive change, while also helping to maintain what makes Gallatin Valley unique. Thanks to you, we are making our community not only better together, but better forever.*



Bridget P. Wilkinson

Bridget Wilkinson,
President & CEO



Jennifer Lammers

Jennifer Lammers,
Board Chair

***Meet the Team on page 11.**



How We Do Our Work

At One Valley Community Foundation, we believe in the power of all people to make a difference in our communities.

We celebrate what makes our communities special and we work – every day – with generous donors and remarkable organizations to chart a course for a healthy and vibrant future. We connect people who want to make a difference with the causes that matter most to them, and strive to strengthen nonprofit organizations whose mission-driven work has never been more important. We bring people together, because together we are all stronger.

Building on unprecedented recent successes, and with a clear view to a bright and bold future, One Valley Community Foundation is preparing to grow in new and innovative ways. However, we can't grow into that vision alone. Together with those who've come to trust us and believe in our mission, we seek to:

Partner with a growing number of donors to establish funds on their behalf that support the charitable causes and organizations they value most.

In 2021, One Valley Community Foundation invested and managed 47 distinct funds on behalf of 39 generous philanthropists, with total assets of \$54 million. Those funds helped to provide over \$2.39 million in transformative and essential support to 241 nonprofit organizations.

Looking to the future, we seek to deepen our relationships with existing fund holders and grow the number of donors we serve. Through their generosity, we'll increase the impact we have on the causes they care most about.

Strengthen our communities' nonprofit sector by providing exceptional training and leadership development programs that help essential organizations better deliver on their inspiring missions.

Already, well-attended programs like Board Launch, Nonprofit Café, Dare to Lead and Financial Bootcamp are helping hard-working nonprofit leaders and volunteers weather the unpredictability of this year and become more resilient organizations.

Building on our success and our reputation for excellence, we know we can expand what's working well, bring innovative approaches to what will be needed next and establish creative partnerships that will allow One Valley Community Foundation to lift our nonprofit sector to new heights.

Multiply the impact of grassroots generosity for the benefit of a growing number of local organizations.

Each year, One Valley Community Foundation's Give Big Gallatin Valley inspires thousands of donors to make contributions – large and small – to the causes that inspire them. Hundreds of critical nonprofit organizations benefit from the unprecedented focus on giving.

In 2021, Give Big brought 6,269 community members together to raise \$2,698,018 in just 24 hours for 210 local nonprofits

With growing support from sponsors and matching donors, Give Big Gallatin Valley helps cultivate first-time donors, strengthens relationships with long-standing supporters, and bolsters the sustainability of the organizations that are making a difference across our region all year long.

Address our communities' most pressing challenges by convening critical conversations and engaging diverse stakeholders in innovative ways.

Together, we're working to bring real and sustainable solutions to the challenges our community faces. One Valley Community Foundation's non-partisan leadership role in proven initiatives like A Seat at the Table allows a wide range of perspectives and varied constituencies to help build understanding and inform long-term strategies that ultimately support the vibrancy and sustainability of this place we proudly call home.

Today, our focus is on thoughtfully addressing the challenges of accessible and affordable housing, knowing that our rapidly increasing local cost of living is having an impact on the social, emotional and economic fabric of our region.



“

“It is important to me to work with a Community Foundation that is committed to growing and nurturing a healthy and thriving community,”

— SAS WEBER, DONOR

Montana Wilderness School,
Grantee of Sas and Stuart Weber Fund

Photo Credit: Nathan Norby



Stories of Impact

Donor Spotlight: The Joy of Giving

In 2019, community members Sas and Stuart Weber decided to open a donor-advised fund at One Valley Community Foundation to streamline their giving and to learn more about the needs of local nonprofits in Gallatin County. Setting up a donor-advised fund at One Valley provided the Weber family great tax advantages in addition to leveraging the philanthropic advising services that One Valley provides to help their family be strategic in its charitable giving.

“The grantmaking process is very easy with One Valley,” Sas Weber said. “It can all be done online and the One Valley staff are available to talk to if help is needed. They are very knowledgeable about local nonprofits and can help you direct funds to the issues you care about.”

Opening a fund at One Valley allowed the Weber family to put resources aside for charitable giving while they took time to learn about organizations locally and across the United States that they wanted to support. At times, the Weber family learned about new organizations to support via One Valley’s extensive local knowledge and relationships with nonprofits throughout Gallatin County. Often, these relationships with organizations both large and small are built through One Valley’s nonprofit programming that bolsters the sector.

“It is important to me to work with a community foundation that is committed to growing and nurturing a healthy and thriving community,” Weber said. “One Valley supports the Gallatin Valley through trainings and grantmaking, giving circles and the Give Big initiative.”

Through their giving at One Valley, the Webers are able to make an impact on causes that they care about most while feeling the joy of giving.

“The joy I get from being able to help others through grant making with One Valley is a salve on the wounds from the daily onslaught of bad news and divisive rhetoric,” Weber said. “Giving reminds me that we are all here together and we can help each other to create a just and equitable future for everyone.”

If you are interested in opening a fund at One Valley, please contact our team today at 406-587-6262.



Seat at the Table Conversations –2021

Photo Credit: Jon Catton



Seat at the Table Conversations –2021

Photo Credit: Jon Catton



Stories of Impact

Community Leadership Spotlight: A Seat at the Table – Transformational Conversations About Housing Solutions

On October 14, 2021, hundreds of community members in Gallatin County gathered in libraries, conference rooms, homes and online to discuss strategies for addressing housing and affordability issues. This county-wide initiative led by One Valley Community Foundation is called A Seat at the Table.

A Seat at the Table is a proven civic engagement event that inspires community members to engage in local decision making by collecting stories and data from many small group conversations around a single topic, all on the same day. At our inaugural event in 2018, 74% of participants said that housing is the most pressing need in our county. We intentionally designed A Seat at the Table 2021 to focus conversations on housing affordability and attainability for those who live, work and do business in Gallatin County.

While housing affects each one of us, the solutions are not simple. A Seat at the Table brings together people from all walks of life to share their ideas and to explore solutions based on the experiences of the people affected by housing issues every day. Diverse views are important to create, fund and achieve

powerful solutions. This year, One Valley focused efforts to ensure that diverse perspectives were at the table by reducing barriers for some community members to participate in conversations by providing gas cards, translating our surveys into Spanish, going to where some community members reside by hosting tables at the Gallatin County Detention Center and hosting tables with One Valley staff members in West Yellowstone.

Communities throughout Gallatin County face challenges that include growing housing costs, a lack of housing options and an expanding gap between growing housing prices and slower wage growth. Local leaders and funders are challenged by allocating scarce resources to address the housing needs of our community members. The results of A Seat at the Table will give local government and other leaders and funders diverse, broad, and rich public input about how housing needs can be paired with ideas for local solutions.

“We’re looking for those ideas that maybe we haven’t heard or maybe haven’t even given any thought to. That’s one of the things that we’re

really hoping will come out of these sessions. New ideas and maybe new solutions for a big problem,” said Gene Townsend, President of the Three Forks City Council.

One Valley Community Foundation is the nonprofit organization that identifies and addresses the priorities and concerns of Gallatin County. We believe that all successful communities have something in common – they make it possible for citizens to be engaged in identifying community challenges and solutions. It’s a thing we call “civic infrastructure” and it’s the way we can work together to create a better future. We remain committed to increasing civic participation and dialogue around community issues and opportunities with the firm belief that conversations can create new possibilities.



Scan the QR code to view the ‘A Seat at the Table’ Final Report.



Programs

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

Over the last year, One Valley Community Foundation continued to pivot and adapt programs to safely engage the nonprofit sector during COVID-19. 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 online from their communities throughout Gallatin County.



**We Are HER
-Give Big 2021 Nonprofit Participants**

Give Big Gallatin Valley

Hosted by One Valley Community Foundation since its inception in 2015, Give Big is a 24-hour celebration of giving that connects generous community members with causes they care about most, by raising important, unrestricted funds for nonprofits serving Gallatin County. The goal is simple – inspire people to come together, show pride in their communities and contribute to support the life-changing work of local nonprofit organizations in Gallatin County. In just seven years, our community has raised more than \$8.5 million in unrestricted funding through 55,783 Give Big donations. In 2021, 6,279 community members joined together to raise nearly \$2.7 million for 210 local nonprofits. One Valley. One Day. One Goal.

Nonprofit Café

This free educational and collaborative gathering for nonprofit leaders and board members is a monthly program featuring speakers who present on best practices for nonprofit organizations. Throughout 2021, topics were curated to meet the current needs of the nonprofit sector. This year, participants learned about topics like volunteer management during COVID-19, tips to create engaging Zoom meetings, and how to build strong relationships between staff and board members. On average, One Valley hosted 50 nonprofit leaders each session. Overall, the program had 500 participants utilizing 750 hours of free professional development and training over the course of the year.

Executive Director Roundtable

This monthly gathering is facilitated by One Valley to provide space for nonprofit executive directors to connect, learn from their peers, and share ideas and challenges they are facing. 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.



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

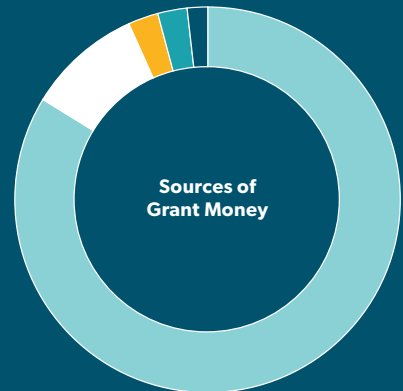
— BRIDGET WILKINSON, PRESIDENT & CEO, ONE VALLEY COMMUNITY FOUNDATION



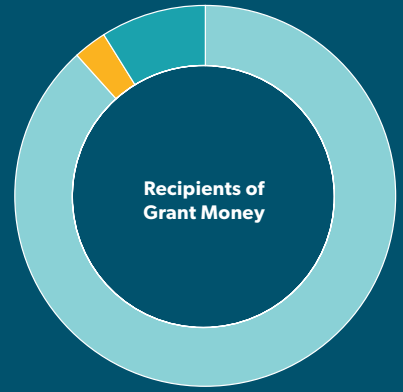
One Valley Giving Impact: How You Gave

GIVE BIG 2021 - TOTAL RAISED

\$ 2,699,000



- Donor Advised Funds
- Give Big Direct Grants
- Emergency Funds
- Other Grants
- Giving Circles



- Gallatin Valley
- Greater Montana
- States Outside of Montana

TOTAL MONEY SENT OUT THROUGH ONE VALLEY IN 2021

\$2,390,036

DONOR ADVISED FUNDS

\$ 2,001,131

GIVE BIG DIRECT GRANTS

\$230,485

EMERGENCY FUNDS

\$59,625

OTHER GRANTS

\$58,795

GIVING CIRCLES

\$40,000

Financials

ASSETS UNDER MANAGEMENT

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

\$54,287,327

TOTAL REVENUE

\$13,421,495

EXPENSES

\$3,825,489

NET INCOME

\$9,596,006

In 2021, One Valley had the opportunity to leverage the infrastructure work done in prior years and increased revenue from administrative fees to scale the organization. We continued to strengthen our finance department by hiring a part-time Office & Finance Administrator and we grew our programmatic capacity by hiring a full-time Community Engagement Manager. During 2021, One Valley's strong financial practices were recognized by the unqualified audit opinion we received for fiscal year 2020 from Rudd & Company, which states that our financial statement disclosures are neutral, consistent, and clear.

One Valley selected the Owen Legacy Group with D.A. Davidson as our new investment managers through a competitive request for proposal process. In 2021,

we worked together to develop new asset pools to match different uses and time horizons. We are pleased to be offering our fund holders excellent investment options through these well-trusted, local partners.

Additionally in 2021, One Valley added another significant agency endowment and several new donor-advised funds and deferred charitable gift annuities. With our increased assets under management, we have been able to more than double the amount of dollars granted directly from funds held at One Valley – \$2.39 million last year – of which 88% went to organizations within Gallatin County. With your support, we can continue to make Gallatin County the best place to live in Montana.

NOTE: \$74,021 of the net income at year-end is unrestricted revenue to One Valley's operating budget. The balance of the net income is in restricted funds such as endowments, donor-advised funds, and agency funds.



*More financial information can be found at onevalley.org/financials. The financials presented are unaudited figures for 2021. Audited financials will be available on our website upon completion.

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 we call home. One Valley is excited to work alongside you. We are, after all, simply better together.

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 by bringing together diverse stakeholders to address issues on a regional level through our Regional Housing Council model.
- 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. We will continue our equity audit work on programs like Give Big to reduce barriers for underrepresented organizations.
- Support those who continue to be affected by COVID-19. 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 aid our community until everyone is safe and healthy. In 2022, through a partnership with Gallatin County, One Valley will be stewarding \$500,000 in American Rescue Plan Act funding to support nonprofit resiliency.

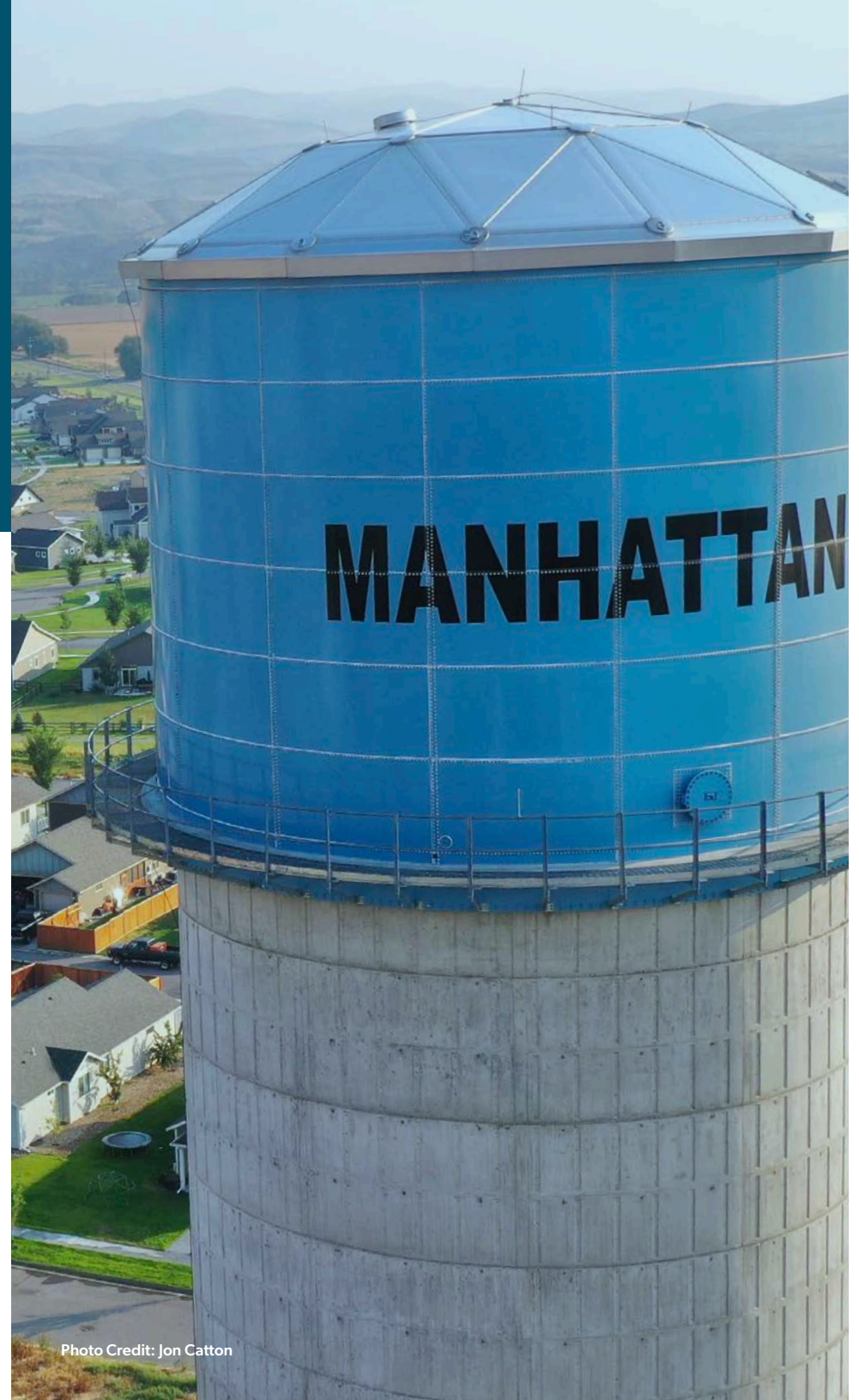


Photo Credit: Jon Catton



Meet The Team



STAFF:

01. Bridget Wilkinson
President & CEO

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
Office & Finance Administrator

06. Anna Burkholder
Marketing and Communications
Coordinator

BOARD:

07. Jennifer Lammers, Board Chair
Executive Director,
Bozeman Schools Foundation

08. Jenifer Schimbene, Vice Chair
Vice President of Client Relations,
Blackmore Group, LLC

09. Eric Van Steenburg, Vice Chair
Associate Professor of Marketing,
Montana State University

10. Jonathan Distad, Vice Chair
CEO, Zinovo and Blackford

11. Kristin Taylor, Secretary
Parent and Engaged Community Member

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

13. Brea Bauer
CPA, Anderson ZurMuehlen & Co.

14. Gene Townsend
Former Mayor of Three Forks, Current
President of Three Forks City Council

15. Courtney Foster
Broker, Owner Referred Realty Group

16. Charlie von Avis
Product Manager for onXmaps Inc.

17. Cassidy Wendell
Community Builder/Founder of
#GIRLGETAFTERIT

18. Crystal Macmillan
CPA, Senior Accountant,
CS and Company





**Thanks to you, we are making
our community not only better
together, but better forever.**

Thank you for being our partners in this work.



Contact Us

406.587.6262
info@onevalley.org

Stay Connected



 [ONEVALLEY.ORG](https://www.onevalley.org)