

A Report on the Capacity and Needs of Bozeman Area Community Foundation & Area Nonprofit Organizations

Prepared by –
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April 2011

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OVERVIEW

Bozeman Area Community Foundation's 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 nonprofit organizations.

Bozeman Area Community Foundation's 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.

Introduction

In November 2011, Peggy M. Owens, CFRE, entered into an agreement with Bozeman Area Community foundation to gain a better understanding of the nonprofit community Bozeman Area Community Foundation (BACF) serves, the local funding landscape and the foundation's ability to provide assistance to local nonprofits.

Outcomes of this assessment are to help the Bozeman Area Community Foundation to identify the nonprofit community's strengths and needs and also gain information about how the Bozeman Area Community Foundation can become a better community partner both now and in the future.

Peggy M. Owens is a consultant with Sage Solutions Nonprofit Consulting, LLC. The following summarizes the findings and recommendations of *A Report on the Capacity and Needs of Bozeman Area Community Foundation & Area Nonprofit Organizations*.

This study would not have been possible without the support and involvement of the Bozeman Area Community Foundation's Board of Directors and in particular, board volunteer Molly Pickall. Ms. Pickall was the key liaison with Ms. Owens throughout the project. In addition, The Mountain Sky Guest Ranch Fund provided funding to allow this project to take place and its Program Director, Tawnya Rupe, gave ongoing encouragement and advice.

Process

In order to capture the input of several key constituencies, a phased approach was developed that included surveying and interviewing the following groups:

- Bozeman Area Community Foundation board members
- Bozeman area nonprofit organization leaders
- Representatives of Bozeman Area Community Foundation past and current grantees

The board interviews were structured conversations utilizing an outline. Some of the topics addressed were the foundation's image and reputation, board involvement in fundraising and insight into the nonprofit sector BACF supports. The entire board of directors was interviewed. Conversations were also held with two long-term volunteers who are no longer serving on the board.

An online needs assessment survey was designed in consultation with the Bozeman Area Community Foundation's Board of Directors for Bozeman area nonprofit organizations and with input from several other nonprofit leaders including Teresa Geremia Chart of the Montana Nonprofit Association and Mike Schechtman of the Big Sky Institute. An invitation to participate was mailed to over 600 area nonprofits in the area with follow-up e-mails sent to a database of 210 nonprofit leaders. 62 diverse nonprofits completed the online survey. It was requested that an organizational leader complete the survey.

In order to gain more in-depth knowledge of the needs and strengths of nonprofits in the Bozeman area a facilitated discussion occurred with BACF funded organizations. The session was led by Peggy M. Owens of Sage Solutions Nonprofit Consulting, LLC and Dan Clark of the Montana State University Bozeman's Local Government Center. Molly Pickall and Tawnya Rupe welcomed participants but did not remain for the discussion in order to allow for a candid discussion.

Profile of participating organizations and interviewees

The 62 organizations who participated in the online survey represent a broad cross-section of the nonprofit community in the Bozeman area. The mission of many of them related to education (34%), followed by youth development (28%) and human services (21%). Arts and culture (18%), community improvement (16%) and the environment (13%) also ranked high. Geographic areas served ranged from Montana (30%) to Bozeman (20%), Gallatin County (20%) and multi-county (20%).

Almost 30% of those who responded are organizations with no staff, 23% have one staff person, 29% have between two and six staff while 18% have seven or more. All of the organizations who are staffed also utilize part-time paid staff. The number of board members supporting organizations varies a great deal with a board of 6-10 being the situation for 40% of the organizations.

One-third of the organizations have budgets of \$100,000 or less with 30% operating in the range of \$101,000 to \$350,000. The remainder had larger budgets.

The 40 organizations who have received funding from BACF were invited to attend the facilitated discussion held on February 15. Board and staff leaders from half of them were present with over 22 representatives participating.

The seven-member Bozeman Area Community Foundation's board of directors and two former board members took part in one-to-one, structured interviews. These meetings took place in advance of survey development and the February 15th meeting and helped shape the information sought through this process.

FINDINGS

Current capacity of the Bozeman Area Community Foundation

The findings about the Bozeman Area Community Foundation's capacity come primarily from interviews with its current board and two former board members. A few documents were also reviewed including the mission and vision statements which are current and compelling.

The overall direction of the organization has evolved from The Planned Giving Foundation of Montana to fulfill the broader purpose of a community foundation. There is still a close connection with BACF's founders.

The Bozeman Area Community Foundation is a volunteer-driven organization. The board is committed to the mission and the transition the organization is undertaking. Board members have a diverse set of skills and work very well as a team. The board has been working very hard. Some board members have been serving the organization for longer than they would like. A committee structure is being developed with active grants and fundraising committees now in place. Board members are aware of the importance of financially supporting BACF and have 100% of the board contributing annually to the organization. The entire board agrees that more members are needed and on average, would like the board size increased to twelve.

Almost all of the board agreed that community awareness needs improvement. At the same time, the Bozeman Area Community Foundation appears to have a good organizational image and positive reputation with those in the nonprofit community who are aware of them.

The board appears motivated to move the organization forward. They are interested in developing a strategic plan. There is a strong desire to find funding to add a staff person and to further develop Bozeman Area Community Foundation's infrastructure in order to provide more services to the nonprofit community.

Resources accessed by area nonprofits

The nonprofits participating in the online survey appear to access a wide range of resources. In the past six months, 61% of them have utilized information, training or assistance from the Montana Nonprofit Association. Peers provided assistance to 43% of the organizations with 33% utilizing the services of an independent consultant or trainer. United Way and nonprofit specific national resources were utilized by 18% of respondents.

Services and Roles Provided by the Bozeman Area Community Foundation

Almost 50% of the organizations completing the online survey have utilized one or more services provided by the Bozeman Area Community Foundation. These include the weekly e-news announcements (44%), attending the Nonprofit Café (25%), attending the annual meeting (23%) and receiving a grant (20%). Additional services requested for BACF by this group were workshops and training (67%), community calendar (62%) and additional networking opportunities (54%).

In the small group discussion on February 15 the following roles were also identified that the Bozeman Area Community Foundation could play:

- Planned giving expertise
- Convener; align nonprofits around issues
- Network/link with other local community foundations and nonprofits
- Help build capacity, hold endowment and build relationships with donors.
- Assist with coordination and overall efficiency of nonprofits, measure outcomes and determine indicators about the sector's capacity
- Provide a larger voice than individual nonprofits. Raise awareness of the good work of that nonprofits are doing throughout our community.

All but one of the organizations participating in the February 15th meeting agreed the best definition of a community foundation to be: *A Community Foundation monitors issues and assets of a community; helps the community respond to change; provides education and networking opportunities for nonprofits to grow to their full potential; and serves donors from within and outside the community by providing funding vehicles and guidance for funding decisions.*

The survey taken by this group spoke to two key roles the Bozeman Area Community Foundation *should* play: provide grants and to monitor issues and indicators in the community to identify needs and assets. Training, networking and providing funding vehicles for donors were also identified as most important by several participants. This group also ranked the services they would like to receive from BACF as follows: Community indicators (32%), community calendar (26%), workshops and training (21%) and networking (11%). All but 12% thought that Bozeman Area Community Foundation is meeting all or a portion of its mission.

Bozeman Area Community Foundation membership

The idea of a membership fee came up in interviews with the board. The topic was addressed both in the online survey and at the meeting with grantees on February 15th.

More than half of the survey participants would be willing to pay Bozeman Area Community Foundation a membership fee. Most of them would be willing to pay \$35 or less.

On February 15th, many of the organizations said they would be willing to pay a fee when the Bozeman Area Community Foundation can provide more services. Most would be willing to pay \$75; some would pay \$35 and several would pay \$125. They had the following suggestions for services they would like to receive from Bozeman Area Community Foundation as membership benefits:

- Help area nonprofits raise money
- Information on trends in local philanthropy
- Community events calendar
- Educate donors, be a liaison

The group also suggested that membership fees could be on a sliding scale, i.e. based on budget.

Training and Networking with other Nonprofits

Short seminars and half-day workshops are the training formats preferred by 95% of survey respondents. Webinars and opportunities for affinity networking would be helpful to about 30% of those who answered. In addition, 47% are interested in networking with other nonprofits and 45% in obtaining assistance from a nonprofit consultant.

The grantee group agreed that more of them would take advantage of networking opportunities if there was “networking with a purpose or training topic instead of just a social.”

Fundraising training was identified as the most beneficial topic, closely followed by board development. Marketing and strategic planning also ranked high. Fundraising and board development were also identified as the top two priorities for training, followed by marketing.

Nearly half of the respondents are willing to pay between \$25 and \$50 for a half-day training. Locations of the most recent training opportunity for those surveyed were in-state (40%), local (30%) and out of state (30%).

Funding and Fundraising

Almost all of the organizations completing the online survey--76%--participate in special events and 81% receive grant funding. Major gifts, corporate sponsorships and annual appeals round out the list of the most popular fundraising vehicles utilized. Grants, major gifts and annual appeals net these organizations the most money.

The Executive Director is the primary fundraiser for half of this group with other staff, including development directors, for 25%. Since many of the organizations in this sample have no staff it is not surprising that board and committee members are the primary fundraisers in 20% of them.

Board giving is a key component for successful fundraising and 70% of these nonprofits have 100% of their board making a financial contribution. Of the group that does not have 100%, 40% have half or more of their board members making gifts.

Of the 15 nonprofits who receive government funding, two rely on it for more than 75% of their overall budget, three rely on it for 50-75% and 26-49% of their budgets with seven up to 25% of their budget.

During the meeting on February 15 participants expressed their awareness of the challenges BACF is facing to obtain sufficient resources to grow and develop. Group members saw no competition between BACF and other nonprofits for funding because it was felt the foundation played a different role in the community than other organizations.

Collaboration and Coordination

Most nonprofit organizations (76%) in the Bozeman area coordinate their services with other groups but 71% also feel they could do a better job of this. More of the participants in the grantee meeting, 69%, than those in the online survey, 27% replied that there are

organizations offering the same services to same client base without meeting the demand. Only 19% of the online survey responses and 25% of the grantees see a duplication of services outweighing the demand in the Bozeman area.

Collaboration and coordination was discussed by the grantee group. The coordination that does exist was described as being organic, not systematic but allows some nonprofits with similar client bases to connect. Many ideas were given on how to improve coordination by “getting leadership talking, consolidation,” and knowing when others are having fundraising events. Examples of local coordination given by the group included the museum pass and the senior services group. The Gallatin Valley Food Bank’s business model is to look for partners and solutions.

Montana State University’s interns and practicum students were identified as supporting collaborative efforts. The Bozeman Public Library was cited as a “community hub.” More opportunities for collaboration could occur with the city and chamber if someone could serve as the nonprofit liaison.

Vision for the Future

Both the Bozeman Area Community Foundation Board of Directors and participants in the February 15th meeting were asked what the community would be like if area nonprofits had the resources needed for success. Some of these comments are listed below:

- A happier, healthier place. A healthy community where everybody has a chance to thrive.
- Social needs cared for
- All abilities, ages and income levels are recognized
- Community involvement and ownership
- Each person has what they need to reach their potential. 100% access; 0% disparity
- Stronger boards
- A lot of the needs of citizens served will be better met than they are today.
- If (nonprofits) didn’t have to spend so much time raising funds, they’d have more time for programs and be more effective at what they are doing.
- A more cohesive feeling among nonprofits. They know each other, help each other. They are still in business, growing, thriving, and expanding.

SUMMARY AND RECOMMENDED ACTIONS

Summary

The findings in this assessment reflect input from a diverse group of organizations representing a good cross-section of the nonprofit sector. These nonprofits access a wide range of resources with more than 60% obtaining assistance from the Montana Nonprofit Association in the past six months.

Area nonprofits leaders identified several areas of need including training, more collaboration and coordination and improved communication among area nonprofits. The organizations appear to have limited fundraising capacity since only 25% have staff other than the executive director focused on this. Most nonprofits in the area are coordinating their services and take a collaborative approach to their work. However, this effort is not systematic and leaders would like to better coordinate their services.

It seems significant that even though the Bozeman Area Community Foundation is just beginning to provide services besides planned giving, 50% of the survey respondents have utilized one or more services provide by BACF. All but 12% of grantee representatives on February 15th view BACF as meeting all or a portion of its mission.

Participating leaders appear to understand the purpose and potential of an active and well-resourced community foundation. The group who met on February 15th readily identified roles they would like the Bozeman Area Community Foundation to fulfill. They see the benefit their organizations would garner if BACF could provide more services and are willing to financially support BACF so it can do so. Most of those who completed the online survey are also willing to pay a membership fee.

This is a critical time for the Bozeman Community Foundation. The organization is poised to fulfill the important work a community foundation can accomplish for both donors and nonprofits. One board member summed it up well, “We need an executive director. Our plans are greater than we can deliver.”

The BACF board of directors is a very committed group of individuals who are doing all they possibly can to move the organization forward. They are willing and ready to transition the organization to one that is playing a much larger role in the community but can do little more without additional resources, including a paid staff and an expanded board.

Recommended Actions:

Because of its limited capacity, the Board of Directors should carefully consider these recommended actions and prioritize those that will have the greatest return for the organization.

Expanding the board of directors and obtaining financial resources appear to be the top two priorities. Increasing the number of board members for an organization is best accomplished through a step-by-step process. A task force or committee could be put in

place to first develop a clear set of expectations for the board and then identify areas of representation needed before beginning a recruitment process. A sample board member job description could be obtained from another community foundation if one is needed. This group, along with the entire board could develop names of prospects. It is not necessary that the board personally know someone before approaching them. What is important is that anyone added to the organization share the passion of its current members for the foundation's mission and vision.

Giving prospective candidates and interested individuals the option to serve on a committee instead of the full board will bring more community leaders into the organization. Expanding the grants committee to include non-board members is one area to consider. Inviting community leaders to participate in this process would increase awareness of BACF and also free up some of the board to assist in other areas.

The fundraising committee could also be expanded to include others from the community interested in furthering BACF's vision. Inviting some fundraising professionals to help even for a limited period of time to brainstorm sources of funding and possibly even work with the board to approach funders might be an avenue to pursue. A future topic of discussion for this group could be to design an area-wide fundraising effort to benefit both BACF and other nonprofits, similar to what community foundations in Red Lodge, MT and Jackson, WY are doing.

If the organization has funds available, a grant writer could be hired to solicit funds for at least a part-time professional staff person as well as an office. It would be helpful for funders to consider a gift spanning several years to allow the organization time to become sustainable.

Until a staff person is hired, any new efforts should build on existing strengths including the weekly e-news sent to more than 210 nonprofit staff and board members, the nonprofit café and the funding currently being provided to nonprofit community. Involving nonprofit leadership in planning for the nonprofit café could allow those with expertise to make presentations at the monthly networking meeting. This may increase attendance from those who want more than a social gathering.

Until the Bozeman Area Community Foundation builds its capacity, it should not consider providing more services to the nonprofit community. Instead, the board could partner with the Montana Nonprofit Association to provide priority training needs to the community. The weekly e-news could be used to promote this. The board of directors should also take advantage of any training offered in the area of fund development and board development. The Association of Fundraising Professionals Montana Chapter is also planning workshops to be held in Bozeman this year.

An organizational plan is something many funders and major donors like to know exists before they make an investment. Detailed goals and realistic objectives for the next 12-18 months would help the board prioritize its actions to maximize their effectiveness. Once developed, progress on the plan could be a topic for board meetings.

When resources are available, the board can reexamine some of the areas of need identified by area nonprofits and the board. Until then, sending out occasional updates to its grantees and other area nonprofits in the weekly e-news could help keep interested

stakeholders informed of progress. In addition, this report could be made available to area nonprofits, community leaders and other stakeholders in the nonprofit community.

APPENDIX

ONLINE SURVEY RESULTS

SUMMARY OF FEBRUARY 15 MEETING

BOZEMAN AREA COMMUNITY FOUNDATION BOARD OF DIRECTORS

ABOUT BOZEMAN AREA COMMUNITY FOUNDATION

BOZEMAN AREA COMMUNITY FOUNDATION GRANTEES

Results of On-line Survey



Information about area nonprofits

What category best describes your mission?		
Answer Options	Response Percent	Response Count
Arts and culture	18.0%	11
Environment	13.1%	8
Animal Welfare	3.3%	2
Health Care	9.8%	6
Mental Health and Crisis Intervention	4.9%	3
Diseases and Disorders	0.0%	0
Youth Development	27.9%	17
Education	34.4%	21
Advocacy	4.9%	3
Crime and legal related	3.3%	2
Employment	6.6%	4
Food, Agricultural and Nutrition	4.9%	3
Housing and Shelter	3.3%	2
Recreation and Sports	9.8%	6
Human Services	21.3%	13
Community Improvement	16.4%	10
Religion and religion-related	4.9%	3
Other (please specify)		15

Other categories include: Native American culture, sustainable transportation, economic development, gender specific, affordable housing, outpatient treatment for substance abuse, habitat

What category best describes the geographic area you serve?		
Answer Options	Response Percent	Response Count
Bozeman	19.7%	12
Belgrade	1.6%	1
Big Sky	1.6%	1
Livingston	0.0%	0
Manhattan	0.0%	0
Gallatin County	19.7%	12
Multi-county	19.7%	12
State of Montana	27.9%	17
Multi-state/National	9.8%	6
International	0.0%	0
Other (please specify)		10

Other includes: Gallatin and Park Counties; Gallatin, Park and Meagher Counties; Montana US and International; Greater Montana, Madison and Gallatin Counties; Montana and Wyoming; Montana; Ruby Valley; Gallatin County, including West Yellowstone

Number of full time paid staff:		
Answer Options	Response Percent	Response Count
0	29.5%	18

1	23.0%	14
2	6.6%	4
3	13.1%	8
4-6	9.8%	6
7-10	3.3%	2
11-15	1.6%	1
>15	13.1%	8

Number of part time paid staff:		
Answer Options	Response Percent	Response Count
0	23.0%	14
1	23.0%	14
2-6	42.6%	26
7-10	4.9%	3
11-15	0.0%	0
>15	6.6%	4

Number of board members?		
Answer Options	Response Percent	Response Count
1-5	26.2%	16
6-10	39.3%	24
11-15	23.0%	14
>15	11.5%	7

What is your organization's annual budget?		
Answer Options	Response Percent	Response Count
<\$25,000	16.4%	10
\$25,001-\$50,000	6.6%	4
\$50,001-\$100,000	9.8%	6
\$101,000-350,000	29.5%	18
\$351,000 - \$500,000	19.7%	12
\$500,000-\$1 million	6.6%	4
>\$1 million	11.5%	7

Section 2: Resources you access

Which of the following kinds of resources has your organization accessed for information, training, or assistance in the last 6 months? (Check all that apply)		
Answer Options	Response Percent	Response Count
Montana Nonprofit Association	60.7%	37
Other Nonprofit State Association (Name in question 14)	6.6%	4
National Nonprofit Association (Name in question 14)	21.3%	13
United Way	18.0%	11

Independent Consultant or Trainer	32.8%	20
Nonprofit-specific national resource (e.g. BoardSource)(Name in question 14)	18.0%	11
Friend or peer in the nonprofit community	47.5%	29
None	18.0%	11
Other (please specify)		8

Other: Prospera, Associated Employers, Montana 4-H, OJJDP, MSU Extension, Toastmasters, Area V Agency on Aging, Mountain Sky event, GVLТ, United Way, Hopa Mountain, MEDA, Corporation for National Service, Montana Child Care Resource and Referral Network, Local leadership networks, National Association of School Foundations, Montana Association of Community Disability Services, SCORE, Habitat for Humanity International, Association for Healthcare Philanthropy, National 4-H, Association of Christian Schools, Family Promise National, BoardSource, Blue Avocado, Foundation Center, The Nonprofit Quarterly

In the last six months, which of the following services offered by the Bozeman Area Community Foundation have you or others in your organization accessed?

Answer Options	Response Percent	Response Count
Received grant	19.7%	12
Attended annual meeting	23.0%	14
Attended monthly Nonprofit Café	24.6%	15
Received weekly e-news announcements	44.3%	27
None of the above	50.8%	31

As the Bozeman Area Community Foundation builds its capacity, what additional services would you like the Foundation to provide for area nonprofits? (Check all that apply)

Answer Options	Response Percent	Response Count
Workshops and Trainings	67.2%	41
Additional networking opportunities	54.1%	33
Community calendar	62.3%	38
Technical or “Back Office” support	21.3%	13
Community Indicators	36.1%	22
Other (please specify)		8

Other: Grant writing workshop, funding opportunities for West Yellowstone, career center for job postings, opportunity to share resources such as accounting and office help,

Would your organization be willing to pay the Bozeman Area Community Foundation an annual membership fee?

Answer Options	Response Percent	Response Count
Yes	57.4%	35
No	42.6%	26

If you answered yes, what amount would you be willing to pay?

Answer Options	Response Percent	Response Count
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\$35	78.8%	26
\$75	21.2%	7
\$125	0.0%	0
\$175	0.0%	0

Section 3: Training and Networking with other nonprofits

What format of networking/training and support are you most interested in? (Check all that apply)		
Answer Options	Response Percent	Response Count
Networking opportunities with other nonprofits	46.6%	27
Affinity networking (ex. Executive Directors only, Development Directors only, Board Members only, etc.)	32.8%	19
Short seminars/lunch meetings (1-2 hours)	51.7%	30
Half-day workshops	43.1%	25
Full day/multi-day classes (in-depth)	15.5%	9
Webinars	31.0%	18
Nonprofit consultant	44.8%	26
Other (please specify)		2

Other: Fostering a collaborative environment

What training topics would be most beneficial to your organization? (Check all that apply)		
Answer Options	Response Percent	Response Count
Human Resources/Personnel Issues	27.6%	16
Fundraising	63.8%	37
Board Development	55.2%	32
Leadership/Staff Development	27.6%	16
Fiscal Management	24.1%	14
Marketing	43.1%	25
Technology	25.9%	15
Advocacy/Public Policy	12.1%	7
Program/Service Evaluation	22.4%	13
Strategic Planning	32.8%	19
IRS Compliance/Taxation	8.6%	5
Other (please specify)		4

Other: Social networking, risk management, grant writing

Of the training topics you checked above, what would be your top priority?		
Answer Options	Response Percent	Response Count
Human Resources/Personnel Issues	4%	2
Fundraising	35%	18
Board Development	20%	10
Leadership/Staff Development	5%	3
Fiscal Management	5%	3
Marketing	11%	6

Technology	7%	4
Advocacy/Public Policy	2%	1
Program/Service Evaluation	2%	1
Strategic Planning	4%	2
IRS Compliance/Taxation		1
Other (please specify)		1

Other: Grant writing

What would you be willing to pay (per person, per day) for a half/full-day workshop of interest to your organization?

Answer Options	Response Percent	Response Count
\$10	25.9%	14
\$20	14.8%	8
\$25-50	46.3%	25
\$50+	13.0%	7

Where was the last training opportunity you or someone in your nonprofit participated in:

Answer Options	Response Percent	Response Count
Local	29.5%	13
In-state	40.9%	18
Out of state	29.5%	13

Section 4: Fundraising Information

What types of fundraising do you participate in? (Check all that apply)

Answer Options	Response Percent	Response Count
Annual memberships	36.2%	21
Special events	75.9%	44
Major gifts	53.4%	31
Capital campaign (currently or in the next three years)	29.3%	17
Special appeals (ex. Year end, special project, etc.)	51.7%	30
Grants	81.0%	47
Corporate Sponsorships	55.2%	32
Other (please specify)		11

Other includes: Unsolicited donations, Sweet Pea food vendor, monthly giving, membership, planned giving, ticket sales, endowment building

What fundraising activity nets your organization the most money?

Answer Options	Response Percent	Response Count
Annual memberships	13.8%	8
Special events	22.4%	13

Major gifts	24.1%	14
Special appeals (ex. Year end, special project, etc.)	10.3%	6
Grants	29.3%	17
Other (please specify)		8

Other includes: Corporate sponsorships, private donations, Girl Scout cookies

What percent of your overall budget comes from government sources (if applicable)	
Answer Options	Response Count
	43

What percent of your overall budget comes from government sources (if applicable)		
Answer Options	Response Percent	Response Count
0	35%	8
Up to 25%	30%	7
26–50%	13%	3
50---75%	13%	3
76–100%	8%	2

Who is your primary fundraiser?		
Answer Options	Response Percent	Response Count
Executive Director	51.7%	30
Development Director	10.3%	6
Other staff	15.5%	9
Committee	6.9%	4
Board	13.8%	8
Professional grant writer	1.7%	1
Other (please specify)		6

Other includes: Combination, 40% raised from board members—the rest comes from MSU and state funds, program coordinator, development coordinator

Do you have 100% board giving?		
Answer Options	Response Percent	Response Count
Yes	65.5%	38
No	34.5%	20

If no, what percentage of your board contributes on an annual basis?		
Answer Options	Response Percent	Response Count

<25%	50.0%	11
25%--50%	9.1%	2
51%--75%	27.3%	6
>75%	13.6%	3

Section 5: About Collaboration and Coordination within the Sector

Please choose the statement that you feel best describes this area's nonprofit sector:

Answer Options	Response Percent	Response Count
There is very little duplication of services	53.4%	31
Several organizations offer the same services to the same client base but the supply of services is not any greater than the demand	27.6%	16
Several organizations offer the same services to the same client base, and this overlap results in the supply of services outweighing the demand	19.0%	11

Does your organization coordinate its services with other organizations that complement the services you provide?

Answer Options	Response Percent	Response Count
Yes	75.9%	44
No	24.1%	14

Do you think the Bozeman area nonprofit sector could do a better job of coordinating services across organizations?

Answer Options	Response Percent	Response Count
Yes	70.7%	41
No	29.3%	17

Please explain:

- A platform for communications could be useful.
- Several non-profits are doing the similar activities. Especially fund-raising at similar times
- Sharing and recruiting of volunteers for one day events would be helpful.
- Development of inter-organizational relationships/projects and program indicators can be improved
- The Bozeman area does a good job, however, there's always room for improvement
- In our field, I feel we do it pretty well
- I would like to know more about coordinating services across organizations.
- By just getting leadership talking
- Some organizations that provide similar services should consider consolidation.
- We all live and work in silos.
- Not sure groups are open to being coordinated

- It appears there is a lot of duplication across the conservation sector, but not really for human services.
- Knowing which organization is offering a fundraiser and on what date would be a significant help
- Many nonprofits are not at all involved in coordination efforts
- Too many non-profits formed before recognition of what is already being provided.
- More collaborative efforts would be beneficial.
- Doing a good job!
- Need to network more
- Only so many donors and participants in Bozeman!
- There is always room to be better at what we do

Bozeman Area Community Foundation
Meeting with Grantees
Survey Responses from Grantee Organizational Representatives (22)
February 15, 2011

1. Which statement best defines what a “community foundation” should be?
 - a. Community foundations serve donors by being a bank for philanthropic transactions. 5%
 - b. The purpose of a community foundation is to build a permanent nonprofit institution that both honors donor intent and flexibly responds to community needs over the long term.
 - c. A Community Foundation monitors issues and assets of a community; helps the community respond to change; provides education and networking opportunities for nonprofits to grow to their full potential; and serves donors from within and outside the community by providing funding vehicles and guidance for funding decisions. 95%

2. What is the MOST important role that the Bozeman Area Community Foundation *should* play:
 - a. Monitor issues and indicators in the community to identify the community’s greatest needs and assets 35%
 - b. Provide grants to Bozeman area nonprofits 40%
 - c. Offer networking and education opportunities for nonprofit professionals 10%
 - d. Provide funding vehicles for donors and help them make their funding decisions 15%
 - e. Provide technical and back office services to help small nonprofits
 - f. There is no need for a community foundation in Bozeman

3. Is the Bozeman Area Community Foundation meeting its mission to “*identify current and emerging issues in the local community and offer a viable funding source, education, and support for local nonprofits?*”
 - a. Yes I feel the Foundation is meeting this mission 6%
 - b. Partially, the Foundation is a good funding source for my organization 29%
 - c. Partially, my organization receives helpful education/networking opportunities 18%
 - d. B & C 35%
 - e. Not at all, the Foundation does not meet my organization’s needs 12%

4. As the Bozeman Area Community Foundation builds its capacity and services for nonprofits, what resources would be most important to your organization? Please rank the following on a scale of 1 to 5 (1 = least important and 5 = most important) Could not do scale. Largest % = most important
 - o Workshops and Trainings 21%
 - o Additional networking opportunities 11%
 - o Community calendar 26%
 - o Technical or “Back Office” support 11%
 - o Community Indicators 32%

5. If the Bozeman Area Community Foundation were to become a membership-organization, would your organization join and what do you feel is an appropriate membership fee?
 - o My organization would not pay for a membership. 26%
 - o \$35 26%
 - o \$75 32%
 - o \$125 16%
 - o \$175

6. Which of the following statements best describes this area's nonprofit sector:
 - o There is very little duplication of services 6%
 - o Several organizations offer the same services to the same client base but the supply of services is not any greater than the demand 69%
 - o Several organizations offer the same services to the same client base, and this overlap results in the supply of services outweighing the demand 25%

Please rate the following statement on a scale of 1 to 5 (1 = strongly disagree and 5 = strongly agree)

7. Your organization coordinates its services with other organizations that complement the services you provide.
 - Strongly Disagree
 - Agree 53%
 - Neutral 6%
 - Disagree 12%
 - Strongly Agree 24%

Please rate the following statement on a scale of 1 to 5 (1 = strongly disagree and 5 = strongly agree)

8. The Bozeman area nonprofit sector could do a better job of coordinating services across organizations.
 - Strongly Disagree
 - Agree 56%
 - Neutral 6%
 - Disagree 6%
 - Strongly Agree 33%

Small Group Discussion Summary

After surveying the group on the first five questions, two smaller groups facilitated by Dan Clark and Peggy Owens, talked with participants about BACF: What do they do well? What could their role in the community be?

What should we have asked about BACF that we didn't about the role BACF could have in the Bozeman area?

- Planned giving expertise x2
- Convener; align nonprofits around issues
- Network/Link with other local community foundations and nonprofits
- BACF's role is to help build capacity, hold endowment and build relationships with donors.
- BACF can assist with coordination and overall efficiency of nonprofits, measure outcomes and determine indicators about the sector's capacity
- Unclear about role
- Who is on the board?
- BACF gives small grants
- Unclear about the outcomes achieved as a result of grants awarded
- It was unclear why we received checks. After research we learned it was a donor advised fund.
- How is BACF's role different from United Way?
- No competition between BACF and other organizations for funding as they play different roles in the community.
- Larger voice than individual nonprofits. Raise awareness of the good work of that our nonprofits are doing throughout our community.
- BACF needs to grow its funds/resources

What else could help your organization or other nonprofits you are familiar with succeed in today's environment?

- Calendar of local foundation's grant cycle, due dates, etc
- Community calendar of fundraising events
- Information about Montana funders and Bozeman funders
- Where do local philanthropic dollars go and where do they come from?
- Community calendar (self administered is okay)
- Networking with a purpose or training topic instead of just a social
- Bring other funders to nonprofits/show case the work of area nonprofits with them in the room.

Would it be better for the sector if BACF would distribute fewer grants for larger amounts than what they are doing now?

- Process is good given the resources available

What would you expect for a BACF membership?

- Help area nonprofits raise money
- Info on local philanthropy

- Community events calendar (gmail has a vehicle for this)
- Use membership \$\$ to hire staff, e.g. infrastructure assistant
- Membership should be on a sliding scale, i.e. based on budget
- Educate donors, be a liaison

After survey questions six through 8, the two groups work to achieve a greater understanding of collaboration and coordination among nonprofits in the Bozeman area

What does your organization do to coordinate and collaborate?

- Museum 1 pass-4 museums
- Social services working together around common issues and clients
- Wellness and CHP includes WIC and public assistance
- Senior services group
- Food bank's business model is to look for partners and solutions
- Computer museum works with MSU to develop a k-12 curriculum on the history of science and technology; outcome based
- Community Health Partners challenged by the board to collaborate
- Food Bank is looking at poverty issues; helps clients with fire alarms through a partnership with the fire dept. Looks for free, low cost partnerships
- For Parks works with Montana Conservation Corps
- Cancer support community has a referral system for clients
- Liberty place works with social services and VA

What do you see others in the nonprofit community doing to collaborate and coordinate services in the area?

- Efforts are organic, not deliberate
- Demand exceeds resources with regard to healthcare
- Collaboration emphasized on grant application

What opportunities exist for collaboration?

- What assets do we have in the Bozeman area for optimizing relationships?
- Library is a community hub
- MSU interns and practicum students. Faculty help design needs assessments
- Hospital a resource for diverse specialists
- There is no community system to address issues
- A nonprofit liaison with city and the chamber is needed

Vision: To conclude the meeting, participants shared their thoughts about the future of Bozeman if nonprofits had the resources needed for success.

Less struggling

Harmony

- Social needs cared for
- 100% access; 0% disparity
- Happier healthier place
- Performing arts center
- Few nonprofits/less need
- All abilities, ages and income levels are recognized
- Healthy community where everybody has a chance to thrive.
- Community involvement and ownership

- Each person has what they need to reach their potential



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(As of September 15, 2010)

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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.

Bozeman Area Community Foundation Grant Organizations

American Computer Museum
American Red Cross
Big Brothers Big Sisters Gallatin County
Boys and Girls Club
Bozeman Deaconess Foundation
Bozeman Public Library Foundation
Bozeman Senior Center
Bozeman Symphony
Bridger Clinic
Cancer Family Network
Cancer Support Community Montana
Child Care Connections
Children's Museum
Community Health Partners
Community Mediation Center
Eagle Mount
Emerson Cultural Center
Florence Crittenton Home
FORParks
Gallatin Valley Food Bank
Gallatin Valley Land Trust
Greater Gallatin United Way
Heart of the Valley Animal Shelter
Hearts and Homes Family Resource Network
Help Center
Hopa Mountain
Liberty Place
LOVE Inc.
Make-a-Wish Foundation Montana
Montana Ballet Company
Montana Outdoor Science School
Museum of the Rockies
Pioneer Museum
REACH, Inc
Rocky Mountain Hemophilia Assoc
Salvation Army
Yellowstone Gateway Museum
Yellowstone Public Radio
Youth Imperative Center