TABLE OF CONTENTS:

WHAT IS A COMMUNITY FOUNDATION? 3
WHO WE ARE 4
GUIDING OUR WORK: MISSION, VISION, VALUES 5
   MISSION 5
   VISION 5
   VALUE 5
LOOKING AHEAD: Missoula Community Foundation 2.0 6
   HOW WE WORK 8
   FOCUS AREAS 9
   OUR ROLES 11
MEASURING OUR PROGRESS 12
   Fund Management and Accreditation 12
   Enhancing our Existing Programs 12
   Growing our Impact 12
WHAT IS A COMMUNITY FOUNDATION?

Community Foundations are on the cutting edge of today’s philanthropy. They provide a way for even the smallest financial donor to make a lasting difference in the communities they love, while allowing like-minded investors to pool their resources – creating a greater financial impact than they could alone.

Community foundations work with individuals, families, businesses, and organizations to create permanent charitable funds that help improve communities. They invest and administer these funds.

Additionally, community foundations are important partners in building and strengthening community, bringing together people and organizations that want to make a difference within their city, county, state, and beyond. They are tax-exempt public charities that help guide philanthropy and are committed to improving the quality of life in the areas they serve.
In 2000, the Missoulian led a ‘Celebrate 2000’ campaign to give back to the Missoula community. This resulted in a permanent endowment of $45,000 for Missoula to launch what was then called Celebrate Missoula. Today Celebrate Missoula is the Missoula Community Foundation. During the initial ‘Celebrate 2000’ campaign, the Missoulian also gifted another $25,000 to be given out in small grants. Over the years, Missoula Community Foundation has funded projects such as the benches structures Silver Park, the projector for the North Missoula Outdoor Cinema, and the bridge at the fishing pond near Bancroft and Southwest Higgins. Since 2000, we have granted out $155,000 from the earning of our endowment to area nonprofits.
• In 2007, Celebrate Missoula hired its first staff person.
• In 2009, Celebrate Missoula merged with Western Montana Community Foundation to become Missoula Community Foundation.
• In 2011, Missoula Community Foundation launched its Scholarship Fund. Since then we’ve granted 42 scholarships to Missoula high school seniors.
• In 2013, we launched the Missoula Project for Nonprofit Excellence (MPNE), which has delivered $195,000 worth of intense capacity building services to 17 area nonprofits.
• In 2014, we launched Missoula Gives, an annual, 26-hour campaign that celebrates our community. Our platform has helped raise $1.7 million for the region’s nonprofits. With more than 160 nonprofits participating and 2,330 donors.

We are very proud of our programs and the funds that we have dispersed. Today we have two staff members and our endowment is valued at $390,000.

GUIDING OUR WORK: MISSION, VISION, VALUES

MISSION
Enhance community vitality by inspiring community giving and strengthening nonprofits

VISION
A thriving, unique, and engaged community

VALUE
Community Driven. We believe that people come first; we listen to our community, partners, nonprofits, and donors to inform our work.

Integrity. An abiding pledge to trust, honesty, professionalism, civility, and respect. We safeguard our donors’ intent in perpetuity.
Innovation. We want to approach our work with an open mind, inviting new ideas and pioneering practices. We demonstrate creativity, resourcefulness, and ingenuity in achieving community good.

Impactful. We want our work to be impactful, to be a partner in shaping and influencing, and making a lasting difference in Missoula, the community we serve.

Equity. We believe that equity is at the heart of all we do, we believe it should drive our decisions, our programs and funding, and is key in creating a thriving community.

LOOKING AHEAD: Missoula Community Foundation 2.0

In 2019, the staff and board of the Missoula Community Foundation decided to look inward and think about how the organization could be more impactful, do a better job of growing philanthropy in our community, and create a more sustainable operating model for us moving forward.

We conducted research on community philanthropy, growing endowments, and community foundation operations. We did a scan of our community and the existing research. We held stakeholder interviews across the community and interviewed our board and staff. We learned a few things.

• Between 1970 and today reliance on non-labor income has increased 150%, the greatest increases were in government funded programs like the Supplemental Nutritional Assistance Program (SNAP) and Social Security.
• Our unemployment rate is low at 3.4%.
• The largest population growth is 65+.
• The cost to care for our aging is increasing.
• There is a growing gap between income and housing costs.
• The number of homeless youth is increasing.
• We have the highest job growth in the state.
• Our community has come together to bring back our rivers, preserve open space, and support arts and culture.
• Our farmers’ market accepts and doubles SNAP benefits.

Our community cares. We are generous and we stand up for what we believe in.

After compiling all of our research and the data we collected we saw clearly that we needed to create a new strategic framework to help guide our work.

Community philanthropy has changed significantly since Frederick Goff first coined the term, “Community Chest” in Cleveland Ohio in 1914. Goff founded the Cleveland Community Foundation with a $45,000 donation. His idea was simple, a community chest (yes Monopoly!) for the future.
needs of the Cleveland community. As of 2013, the Foundation had accepted $975 million in gifts with a market value of $2.1 billion. The Foundation grants $85 million annually. This ‘chest’ has allowed the community to fund and address many of Cleveland’s challenges including education, affordable housing, civil rights, neighborhood revitalization, women’s rights and arts and culture.

At the Missoula Community Foundation we want this kind of investment in Missoula. We recognize that this is an ambitious goal, but feel that the data supports this shift and we know the impact of this will be significant.

In a wealth study transfer, commissioned by the Montana Community Foundation, by 2060 $14.26 billion will be transferred from one generation to the next in Missoula County. If the Missoula Community Foundation could capture just five percent of these funds, it would amount to $712.9 million. This could translate to an annual payout of $35.7 million to fund whatever Missoula’s future challenges might be. This represents a huge opportunity for our community.

**HOW WE WORK**

In order to be more sustainable and take a leadership role in addressing the needs of Missoula we created a new business model to support our work. We want to grow the philanthropic pool for the needs of Missoula. We want to help the hard working nonprofits in our community fulfill their missions. To this end, we will no longer operate as an affiliate of the Montana Community Foundation and will begin to manage our own funds.

This will allow local establishment of donor advised funds, deferred gifts annuities, field of interest funds, and unrestricted gifts. Local management of these funds will allow us to focus on the needs of our community and capture more legacy gifts by providing expertise to donors and to the nonprofit community.
FOCUS AREAS

Empowered by all we learned in 2019, we identified several areas that will allow us to focus on need, opportunity and impact.

**Education:** Education is a gateway to an improved future. We want to improve access to lifelong education, focusing on K-12, secondary education, and opportunities for nonprofits. Education is an integral part of Missoula Community Foundation’s work.

Through our Missoula Project for Nonprofit Excellence (MPNE) program, we have helped identify capacity building projects and funded work to enable area nonprofits to more effectively deliver on their mission. This work is often an overlooked funding area that supports the vital nonprofit infrastructure in our community.

“Capacity building helps organizations obtain, improve, and retain the skills, knowledge, tools, equipment and other resources needed to do their jobs competently or to a greater capacity”

- Julie Osborne MPNE Advisory Committee
Moving forward, we will expand our expertise to be a resource for donors to maximize their giving impact and to nonprofits to increase their planned giving.

**Arts and Culture:** Missoula is what some people call a ‘city town’. Small enough to see your neighbors at the grocery store, but big enough to offer significant opportunities in arts and culture. As we grow there is a concern that we lose these things that make our community special. We want to enhance appreciation of the arts and participation in cultural experiences.

Missoula Community Foundation has long supported the arts and culture in the Missoula community. We have several organizations that we fiscally sponsor: Open A.I.R., Tell Us Something, Preserve Historic Missoula, and Lake Missoula Old Time. We have also had organizations such as ARTS Missoula, The Roxy, and other entities participate in our Missoula Project for Nonprofit Excellence.

Moving forward we will continue to do this work, but will look to build funds and initiatives driven by donors and community needs.

**Community Care:** We care for our community and so do many of the people that live here. We want to create funds that reflect the generosity and care that is evident in this place we call home. Several of the areas that were identified in our research and stakeholder interviews were affordable housing, mental health, addiction, and aging.

Donors may be passionate about affordable housing, aging populations, or public spaces. In that case we may want to create a fund for:

- One time fund for individuals in crisis
- Addressing aging in place
- Public space projects

As we grow we want to serve our donors and address our challenges as a community. As our values state, we want to be *Community Driven.*
OUR ROLES

As we work in these focus areas, we will play three major roles in this work.

**Funder:** As we work to build funds focused on the Missoula community we will pursue civic and philanthropic funds that reflect the intersection of donor interest and Missoula needs. As a funder we will take in, manage, grant and measure impact of funds.

Managing our own funds will allow us to more closely work with donors, to be a voice for their interests, and work at the intersection of donor passion and community need.

**Connector:** We will connect donors to causes they care about. We will connect nonprofits to funders. We will connect outside funders to our community. We will connect nonprofits to the resources they need to be successful.

Missoula Community Foundation is an advocate for the needs of our community and will work to increase the capacity of those doing good work in our community.

**Educator:** We will help educate donors about the mechanisms for charitable giving. We will provide education to nonprofits to more effectively fulfill their missions and strengthen their work. We will help educate the community on issues, trends and data.

In each of these roles we will be focused on our mission and vision for our community. We will work to engage the community in a constructive way to help address problems from the ground up.
MEASURING OUR PROGRESS

A clear workplan will be approved by the board and used to measure our work moving forward. Some of our priorities in 2020 include:

**Fund Management and Accreditation**

We will work toward meeting the standards required to apply for certification for accreditation by National Standards for US Community Foundations. This accreditation shows our commitment of *integrity* to our donors, community, and the public.

**Enhancing our Existing Programs**
We will continue to deliver and strengthen our existing programs. This includes Missoula Gives, MPNE, Missoula Community Foundation Scholarship Program, Fiscal Sponsorships, and Women’s Giving Circle of Missoula County. We strive to be efficient, *innovative, and impactful*.

**Growing our Impact**
In 2019 we identified the focus areas of Education, Arts & Culture, and Community Care. In 2020 we will reach out to those doing important work in those areas. We will learn what is needed and work with donors to develop funds to further enhance the work being done.