



HELENA AREA
COMMUNITY
FOUNDATION

Annual Report

2022

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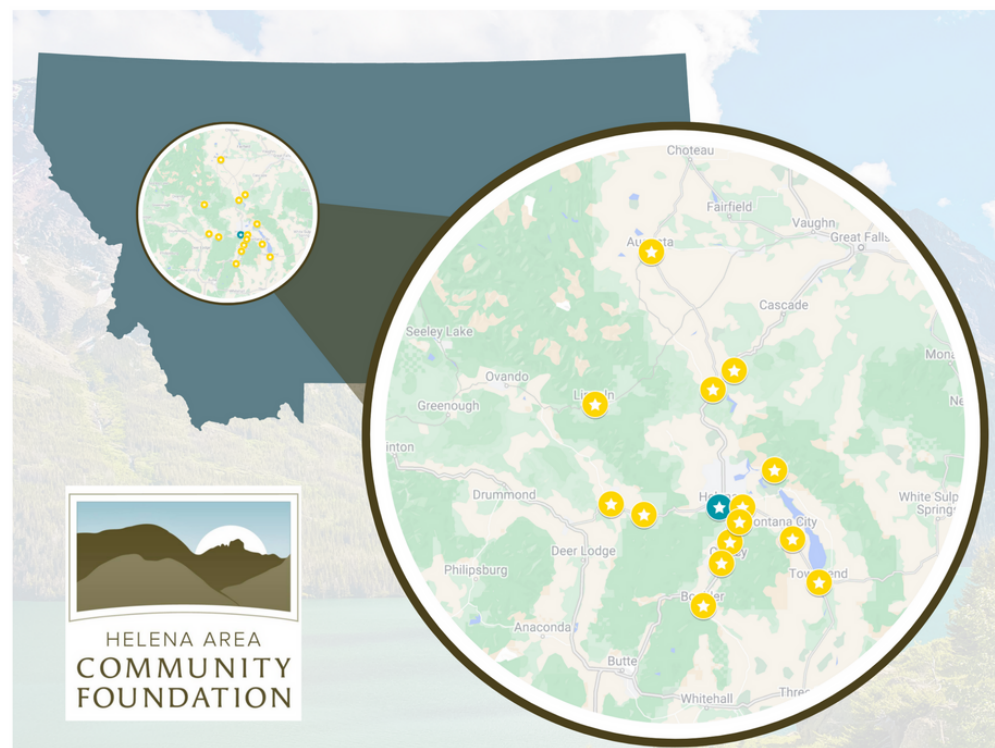
Ellie Webster

Pro Bono Coordinator, Montana
Legal Services Association
Helena, MT

Supporting the Greater Helena Area

The Helena Area Community Foundation supports communities in the greater Helena area through convening and capacity building for local nonprofits, emergency relief funding, and grant making. We are proud to support our local communities!

Communities we serve include: Augusta, Avon, Boulder, Clancy, Craig, East Helena, Elliston, Helena, Jefferson City, Lincoln, Montana City, Townsend, Winston, Wolf Creek, and York.



What makes the Helena Area Community Foundation

different from other charitable organizations?

HACF is local.

HACF awards grants to nonprofits in the greater Helena area for projects that provide a positive impact on residents of Helena and the surrounding communities.



HACF develops partnerships to grow ideas.

HACF pools resources and directs them to projects that make a big impact. This way, small nonprofits can spend more time focusing on their mission, and large nonprofits can see their ideas expand and prosper.



HACF is permanent.

HACF builds and maintains a permanent endowment for the future. While a portion of the endowment's earnings are earmarked for grant making and operational costs, the endowment itself remains untouched and growing. Regardless of the economy, changes in our population, or the political environment, HACF is here today and forever.



HACF is personal.

HACF will work with you to select the giving method that serves your legacy goals and assets. HACF can help you to plan a bequest, charitable remainder trust, or deferred gift annuity and can assist in coordinating gifts that are eligible for the Montana Endowment Tax Credit.

A Message From Our Executive Director



From the moment I began my tenure at HACF in 2019, I knew that this organization was something special. HACF is an organization doing great work each year, and has the potential to do SO much more.

A community foundation has a relatively simple mission, tied directly to the needs and opportunities of a specific place. This focus on place means we have the ability to become or create whatever our community needs. I like to think of it in terms of "Now" and "Forever."

The "Now" is what you see us doing in the community each year. Grant making, hosting Greater Helena Gives, convening nonprofits, and responding to emergencies. It's important work. This annual report, our first in a number of years, will focus mostly on the "Now" stories of 2022.

But the "Now" is only part of the equation—we are always preparing for "Forever."

"Forever" is more than just growing our permanent endowment. "Forever" means growing our capacity as well as the capacity of other nonprofits, increasing the levels of grant making, and inspiring endowment support so that each year we can do more in our community. If we continue our current trajectory of growth, Helena's "Forever" could be impressive.

In 2022 we took some big leaps regarding the "Now" work. In 2023, we hope you'll join us in envisioning "Forever." As another wise Emily (Dickinson) once said, "Forever is composed of nows."

Thank you for being a part of our "Now", and building greater Helena's "Forever".

Emily Frazier

HACF Executive Director

A Message From Our 2022 Board President

Hi Helena! As the 2022 president of Helena Area Community Foundation board, I am excited to share our new annual report highlighting the accomplishments of the Foundation and community last year.

WOW... what a year 2022 was! The Helena Area Community Foundation and other nonprofits in the Helena area and throughout the nation faced continuing pandemic related and economic challenges. However, HACF met the challenges head on and truly thrived, thanks to the generous support of the wonderful Helena community.

2022 might be best remembered by HACF board and staff members as the year of grant cycles. With new partnerships to distribute grant funding from the City of Helena, Lewis and Clark County, and our largest pool of funding available (\$388,000 from the City of Helena for COVID recovery), HACF disbursed over \$475,000 of grant funding to nonprofits in the greater Helena community. Paired with third-year-in-a-row, record-breaking Greater Helena Gives results, 2022 was a banner year for the greater Helena community, and especially for our local nonprofits.

With your continued support, we look forward to building on the achievements of 2022 to strengthen and support the Helena area community... now AND forever.

Jeannie Etchart

Board President '22



Grant Making is Central to HACF's Mission

The Helena Area Community Foundation awards annual grants to local nonprofits as one of the core elements of our programming.

Beginning in 2022, HACF also began granting funds from the City of Helena and Lewis and Clark County in a new partnership designed to support local nonprofits.

We believe that supporting local nonprofits through grant making is the best way to utilize HACF's endowment distribution. At the current levels HACF is granting, we have chosen to focus on projects where a small grant can solve a problem or remove an obstacle.

New partnerships, like those built with the City of Helena and Lewis and Clark County, provide opportunities to increase the amount of funds available to our local community.

As HACF increases the size of our permanent endowments and develops new partnerships, our grant making ability will increase, to the benefit of our communities.

2022 Grant Making Breakdown

In 2022, HACF distributed the following amounts for grants to local nonprofits:

\$30,000

HACF Endowment Funded Grants

\$42,750

City of Helena and Lewis and Clark
County Grants

\$388,000

City of Helena COVID
Recovery Fund Grants

\$14,950

Flash Flooding Emergency Relief Grants

HACF Granting

In 2022, HACF provided \$30,000 of funding to the following organizations:

- Blackfoot Challenge: \$2,000
- Child Care Connections: \$2,000
- Cohesion Dance Project: \$1,000
- ExplorationWorks: \$1,500
- Family Promise: \$2,000
- First Judicial District CASA/GAL: \$1,500
- Florence Crittenton: \$1,600
- Fusion Robotics: \$2,000
- Grandstreet Theatre: \$2,000
- Helena Food Share: \$2,000
- Ironhorse Music: \$1,950
- Montana Playwrights Network: \$1,545
- Myrna Loy Center: \$2,000
- The Angel Fund: \$1,500
- United Way of the Lewis and Clark Area: \$2,000
- West Mont: \$1,770
- York Volunteer Fire Department: \$1,653



Community Partner Stories

The Myrna Loy's mission is to inspire the people of Helena with innovative, high-quality arts experiences of all kinds; to support Montana artists in their work; to foster a lifelong love of the arts through robust arts education; and to build community through art.

The Myrna Loy shared this story:

"We are developing new family programming to bring high-quality arts experiences to whole families with young children, providing arts experiences in the community to age groups who normally only get arts content on screens. Funding supported two series of New York International Children's Film Festival films for ages 5+, plus a performance especially for young families by indigenous Australian powerhouse singer Emma Donovan. We are continuing to work with the young family community in Helena to develop more high-quality programs that are enticing both to young kids and their whole families. Additionally, this school year our Puppet Artists in the Schools brought a special hands-on puppet arts workshop called "The Hedgehog and the Bear" to every kindergarten class in Helena.

We are also collaborating with AARP Montana to create more community-based opportunities for gatherings and socialization targeted to the 55+ population, who report higher incidences of isolation post-Covid. These activities focus on matinee films (with open captioning), and other social events."



City and County Grants

In 2022, \$42,750 in City and County Funding was granted to the following organizations:

City of Helena:

- Capital High Drama Club: \$2,000
- Cohesion Dance Project: \$2,000
- First Judicial District CASA/GAL: \$2,000
- Helena Community Gardens: \$2,000
- Holter Museum: \$2,000
- Instar Enterprises: \$2,000
- Myrna Loy Center: \$1,000
- The Angel Fund: \$2,000
- The Friendship Center: \$2,000
- Family Promise: \$2,000

Lewis and Clark County:

- American Jobs for American Youth: \$2,000
- Aero Montana: \$2,000
- Big Brothers Big Sisters of Central Montana: \$1,300
- ExplorationWorks: \$1,980
- Florence Crittenton: \$1,500
- General Federation of Women's Clubs: \$1,000
- Girls Thrive: \$2,000
- Grandstreet Theatre: \$1,972
- Helena Area Friends of Pets: \$1,000
- Last Chance Community Pow Wow: \$2,000
- Lewis and Clark Humane Society: \$1,000
- Lewis and Clark Literacy Council: \$1,200
- Life Houses: \$1,000
- Montana Free Press: \$2,000
- Plymouth Congregational Church: \$1,812.84

FOCUS IN GRANTING

The 2022 "City of Helena" Fund was distributed to 501(c)(3) organizations in the greater Helena Area, with a priority given to organizations operating within the Helena city limits. Lewis and Clark County Funds can be distributed to organizations in or outside of Helena, Lewis and Clark County, or in regions that serve residents of Lewis and Clark County. Funds had to be used for projects with an expressed public purpose that benefits the residents of the City of Helena or the residents of Lewis and Clark County.

Priority was given to nonprofits who demonstrated a meaningful, specific need that could be fulfilled with a small grant.

Community Partner Stories



Lewis and Clark Humane Society is a small, private, community-based, not-for-profit organization that provides shelter for unwanted and stray animals while working to end pet overpopulation, reduce the need for euthanasia, and improve the humane treatment and well-being of companion animals.

LCHS saw over double the amount of kittens this past year than they did in years before. Kittens require round the clock care and special feeding - especially those who are orphaned. The HACF grant assisted with purchasing specialized food for the nearly 600 neonates that they cared for.

Plymouth Congregational Church made a difference in the lives of our newest neighbors to the Helena community: Afghan refugees.

The funds were used primarily to prepare, plant, water, and maintain a Community Garden plot. The produce that came from the plot was donated to the Afghan refugees who settled in Helena. Because some supplies, soil, plants, and equipment were donated (free of charge), unexpended funds were used to purchase games, toys, school supplies, and winter garments for the Afghan children.



City of Helena COVID Recovery Fund Grants

In 2022 we granted \$388,000 to local nonprofits in the City of Helena through the "COVID Recovery Fund" to the following organizations:

- Angel Fund: \$10,000
- Archie Bray Foundation: \$10,598
- Big Brothers Big Sisters of Central Montana: \$13,667
- Boy Scouts of America: \$4,000
- CASA of Lewis and Clark and Broadwater Counties: \$14,000
- Cohesion Dance Project: \$8,860
- ExplorationWorks: \$10,110
- Family Outreach Inc: \$14,000
- Family Promise of Greater Helena: \$14,000
- Florence Crittenton Family Services: \$14,000
- Friendship Center: \$14,000
- Girls Thrive: \$5,000
- Good Samaritan: \$14,000
- Grandstreet Theatre: \$14,000
- Healthy Mothers Healthy Babies Montana: \$7,975
- Helena Area Friends of Pets: \$2,240
- Helena Area Habitat for Humanity: \$14,000
- Helena Food Share Inc.: \$10,000
- Helena Symphony: \$9,000
- Holter Museum of Art: \$12,000
- Instar Enterprises: \$5,000
- Intermountain Deaconess Children's Services: \$14,000
- Lewis & Clark Humane Society: \$10,000
- Merlin CCC: \$5,500
- Montana Budget & Policy Center: \$14,000
- Montana Children's Foundation: \$14,000
- Montana Legal Services Association: \$14,000

FOCUS IN GRANTING

The 2022 "City of Helena COVID Recovery Fund" was distributed to 501(c)(3) organizations in the greater Helena Area, with a priority given to organizations operating within the Helena city limits.

This funding was specifically earmarked to support nonprofit recovery from COVID-19 related to losses in funding arising from COVID-19 impacts, increased demand for services, tools or equipment needed to retool, changes in community need due to COVID-19 impacts, etc. Local nonprofits were asked to thoughtfully consider the impacts of COVID-19 on their organizations and the community as a whole and to suggest projects or programs that addressed these impacts.

- Montana Playwrights Network: \$2,500
- Montana Preservation Alliance, Inc. (DBA Preserve Montana): \$14,000
- Musikanten Montana: \$11,000
- Myrna Loy: \$14,000
- Premiere Dance Company: \$5,000
- Prickly Pear Land Trust: \$13,050
- Queen City Ballet Company: \$10,000
- Rotary Club of Helena: \$2,500
- UWLCA: \$10,000
- YWCA Helena: \$14,000

Community Partner Stories

Family Promise of Greater Helena



208 children were sheltered along with their families in 2022. The impact to the children and families was immeasurable. They had a safe, secure warm bed; meals; and clothing through one of the most difficult challenges in their lives. Family Promise assisted them in finding safe and secure housing and will follow up for 24 months to assure their success.

United Way of the Lewis and Clark Area

Both this grant and the matching funds were used to support the staffing for Housing First Helena. Community Impact costs included purchasing supplies for the Shower to Empower program, Helena Resource Advocate cards, and advertising and training costs.

The Showers to Empower program not only supports some of our local unsheltered neighbors with a weekly shower, but they also help support them in other ways. Clients are referred to services, put on housing wait lists, provided shoes and socks, and provided car parts as needed to make their temporary homes usable. Campers have been repaired so that the person living in it can move it every couple of days as is required to stay safe and within the law.



Emergency Relief Grant

LIST OF GRANTEES

- Cottonwood ALC: \$2,000
- ExplorationWorks: \$2,000
- Grandstreet Theatre: \$2,000
- Montana Masonic Foundation: \$950
- Queen City Ballet: \$2,000
- Region IV Family Outreach Inc: \$4,000
- YWCA Helena: \$2,000

FOCUS IN GRANTING

Helena Area Community Foundation (HACF) and United Way of Lewis and Clark Area (UWLCA), (with support from First Interstate Bancsystem Foundation and Phillips 66) opened an Emergency Relief Fund in response to the flash flooding incident on July 3, 2022.

Community Partner Stories

ExplorationWorks

As shared by HACF Executive Director Emily Frazier in our newsletter:

"On July 3rd, Helena experienced flash flooding, on a Sunday night of a holiday weekend--when most offices were closed. On July 4th, HACF and United Way of the Lewis and Clark Area opened a joint emergency relief fund. This is one of the reasons community foundations exist, and we are happy we can be of service to our community in times of need.



And, man, we sure do have a great community. I'd like to tell you one of the stories that has arisen from this particular emergency, which centers on something obscure... Black. Rubber. Mulch.

Prior to July 2022, I had never heard of black rubber mulch, but it turns out it is quite important if you have an outdoor play space for kids. It was an important part of ExplorationWorks' outdoor classroom area, and most of it was swept away during the flash flooding. ExplorationWorks had camps coming up a week after the flooding, so making their camp spaces safe was a high priority.

HACF offered to buy the rubber mulch, and United Way coordinated a team to spread it out. When we went to purchase it, though, we found out something unfortunate. Everyone in Helena was out of black rubber mulch. For that, we needed to go to Billings. So, knowing that volunteers were lined up (thanks PayneWest!), I asked on Facebook if anyone happened to be going from Billings to Helena. And then we got a message from a kind fellow named Roger. Roger wasn't in Billings, but he was willing to go. He picked up 25 bags of black rubber mulch from Lowes in Billings, and dropped it off the next morning at ExplorationWorks. ExplorationWorks was able to safely host campers a week after the flooding."

Helena Area Community Foundation Events

Direct investment into HACF programming benefits our local communities and allows us to host amazing events! HACF presents three main events during the year.



In 2015, HACF introduced the **Steve Browning "Spirit of Philanthropy Award,"** which is given to community members who carry on Steve's commitment to make the Helena area a great place to live, work, play, and raise a family.



HACF hosts **Greater Helena Gives** in early May, a 24-hour online fundraiser to support the nonprofits around Helena. Anyone can easily make a donation to the nonprofit(s) of their choice from a single website.



HACF hosts the annual **Helena Holiday Cruise,** a fun family event to view Helena's Christmas lights from the comfort of your vehicle while enjoying local treats and cocoa!

Steve Browning

"Spirit of Philanthropy Award"

The Steve Browning Spirit of Philanthropy Award is named for the founder of the Helena Area Community Foundation. True to its name, this award is given to honor those in the Helena community who live up to Mr. Browning's example of community involvement and philanthropy. HACF had the great pleasure of recognizing Margaret Corcoran and Jim Madden as the 2022 Spirit of Philanthropy Award Winners.



Helena natives Margaret Corcoran and Jim Madden are the kind of philanthropists who usually prefer to work behind the scenes. Married 42 years and parents to 2 daughters, Molly and Lucy, Margaret Corcoran, former long-term HACF board member, and her husband, Jim Madden, attorney for the Department of Environmental Quality, owned Benny's Bistro in Helena for 22 years.

Margaret says, "Nothing makes better word-of-mouth than generosity. I realized that I had both product and a physical space that could help raise precious dollars for those in need. Having events was fun and brought me deeper into the community. My policy in all business matters became never say no."

Now that Margaret and Jim are retired, they remain committed to volunteering in the community, mainly for Helena Food Share. Jim rides the rescue food truck, while Margaret does monthly cooking demonstrations. Margaret and Jim are both excellent examples of lifelong involvement and love for their community. Helena is lucky to have them, and we were proud to honor them with this award.

Greater Helena Gives

In 2022:

995

donors supported

96

organizations
and raised

\$233,970

in 24 hours



Greater Helena Gives is the Helena area's annual 24-hour online giving campaign designed to raise money and awareness for our local nonprofit community.

During the giving period, May 5th-6th, donors made donations to multiple organizations through one transaction. With prizes for nonprofit participants awarded throughout the day, all participants are engaged and all the nonprofits are winners!



\$913,480

raised for area
nonprofits since 2015

2022 Corporate Sponsors

Leading Sponsors

Opportunity Bank of Montana
Montana Radio Company

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Anderson ZurMuehlen
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Browning Kaleczyc Berry & Hoven P.C.
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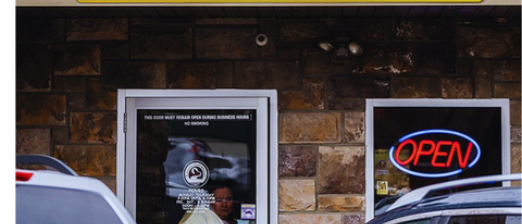
Robert Peccia and Associates

Supporting Sponsors

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Scenic Brew
Bill Roberts Golf Course
The Hawthorn
Big Dipper Ice Cream
Crowley Fleck PLLP
Action Print
Birds and Beasleys
Montana Book Co.
Silver Star
Vanilla Bean



Opportunity Bank
OF MONTANA



Thank you to everyone
who participated in
Greater Helena Gives!

Helena Holiday Cruise



Experience the best of the holiday season! With a thermos full of delicious cocoa and other seasonal treats/local swag, participants use a provided map to view THE BEST Christmas lights in the Helena area.



The Helena Holiday Cruise benefits local businesses and the local community foundation. Ticket prices paid for the local vendors, (keeping our favorite businesses operating,) with additional proceeds going to the Helena Area Community Foundation for nonprofit grants.

412
tickets sold

over \$15,000
raised

1,650
participants

Participants said:

"The treats were delicious! That hot chocolate is simply the best thing ever. We love the ornaments and thermos we receive each year! It's now a family tradition and we tell others about it too."

"The Trolley is a nice addition and we're hoping to take it next year. It's a well organized event and I appreciate the hard work of your staff and the homeowners."

"It was wonderful...this was our second year and we love it. The light displays are amazing and the hospitality was great!"

2022 Corporate Sponsors

Warming Our Hearts & Homes
NorthWestern Energy

Star On Top Of The Tree
Browning Kaleczyc Berry & Hoven P.C.

Greatest Gift Sponsors
St. Peter's Health
Scenic Brew
Helena Youth Soccer Association
PacificSource of Montana
Buffalo Church

Cookies & Cocoa Sponsors
Anderson ZurMuehlen
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Vendors and Supporters
Last Chance Photography
Park Avenue Bakery
Autumn Essence Photography
Qwik Signs
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Action Print
Old Fashioned Kettle Corn Co.

Media Sponsors
Montana Television Network
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NorthWestern[®]
Energy
Delivering a Bright Future



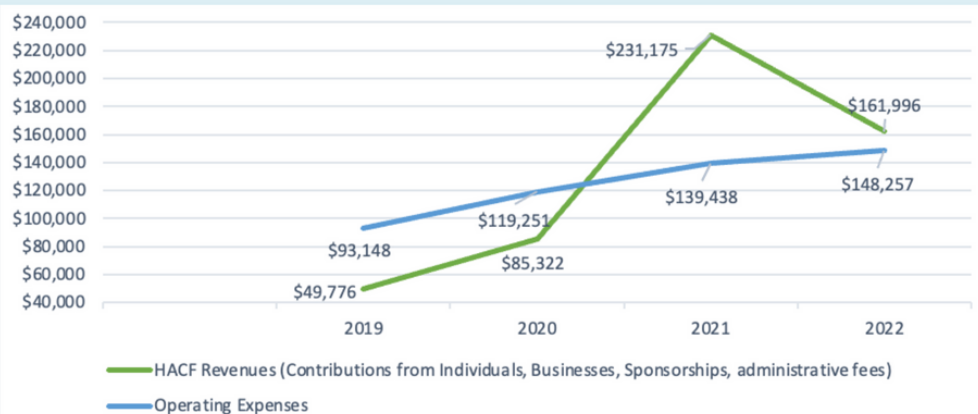
We thank you for your continued support of HACF's programs!

Financial Summary

Consolidated Statement of Financial Position		
	2022	2021
ASSETS		
Total Current Assets	177,391.41	183,557.54
Total Other Assets	335,087.10	371,973.82
TOTAL ASSETS	512,478.51	555,781.36
LIABILITIES AND EQUITY		
Total Liabilities	35,718.60	5,314.90
Equity		
Unrestricted Net Assets	176,196.10	30,623.80
Permanently Restricted Assets	335,087.10	371,973.82
Unrealized Gain/Losses on Endowment Earnings	-23,078.15	39,183.26
Opening Balance Equity	-1,100.00	0.00
Net Revenue	-10,345.14	108,685.58
Total Equity	476,759.91	550,466.46
TOTAL LIABILITIES AND EQUITY	512,478.51	555,781.36

Revenue Growth and Operating Expenses, 2019-2022

*Note: does not include endowment earnings or grant funding awarded to nonprofits

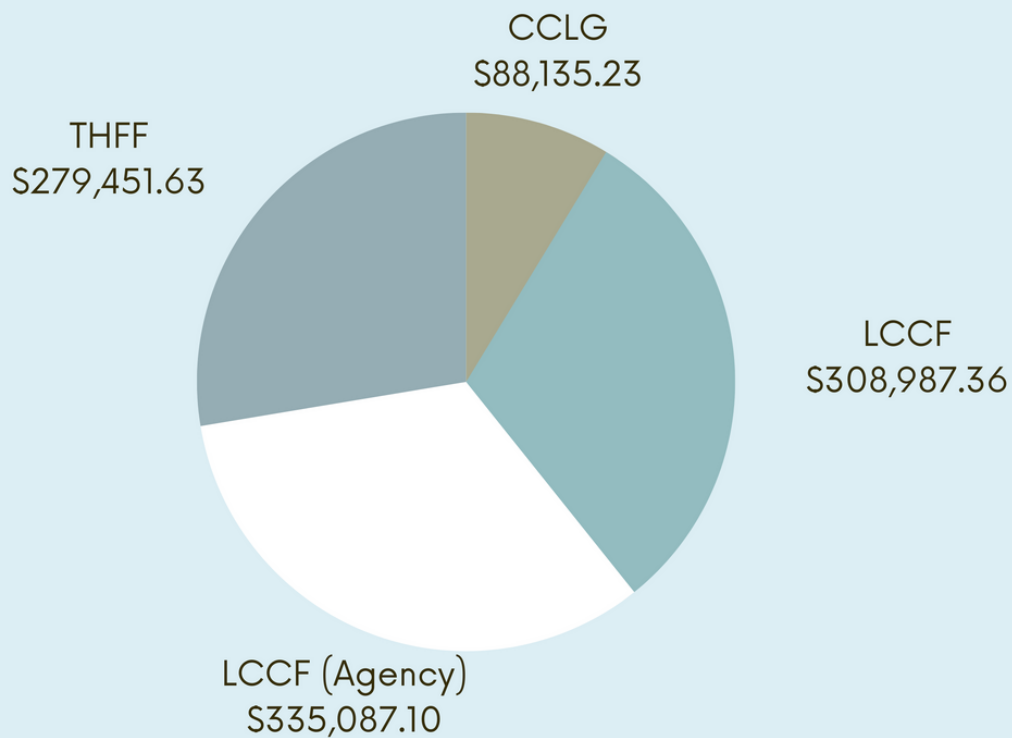


Financial Summary

Consolidated Statement of Activity		
	2022	2021
Total Revenue	161,996.18	231,175.08
Expenditures		
Personnel Expense	68,747.90	64,289.86
Office Expense	66,155.19	60,383.15
Professional Services	6,600.00	9,384.27
Board Expenses	1,040.05	118.90
Payment Fees	222.75	
Total Expenditures	142,765.89	134,176.18
Net Operating Revenue	19,230.29	96,998.90
Other Revenue		
HACF Endowment Distribution	13,090.51	12,136.27
Thomspon Family Fund Endowment Distribution	13,360.52	12,767.43
Steve Browning Internship Endowment Distribution	4,210.87	3,985.80
Passthrough Grants, City of Helena	447,000.00	
Other Grants		11,121.70
Total Grants received	477,661.90	40,011.20
HACF Agency Endowment Income	7,880.81	11,701.84
Total Other Revenue	485,542.71	51,713.04
Other Expenditures		
Donor Events	2,541.00	2,236.50
Grant Disbursements to Nonprofits	489,154.62	24,106.00
Greater Helena Gives Passthrough Funds	21,406.86	4,104.67
Greater Helena Gives Prizes	2,950.00	3,025.00
Realized Gain or Loss on Sale of Stock	-934.34	6,554.19
Total Other Expenditures	515,118.14	40,026.36
Net Other Revenue	-29,575.43	11,686.68
Net Revenue	-10,345.14	108,685.58

ENDOWMENT COMPOSITION

HACF receives distributions from \$1 million held in endowments by the Montana Community Foundation for the benefit of HACF. HACF received \$47,376 in distributions from the endowments in 2022. These distributions were used for HACF operations, funding a Carroll College intern, and for grant making.

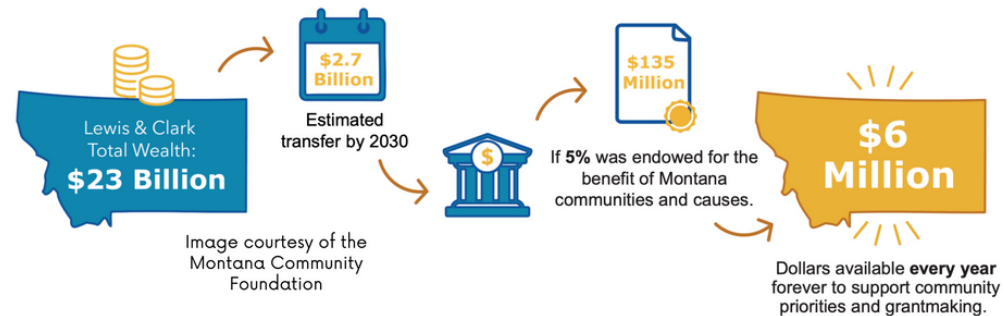


- THFF: Thompson Family Fund for the Benefit of the Helena Area Community Foundation
- CCLG: Steve Browning Fund for Community Service and Philanthropy
- LCCF: Helena Area Community Foundation Endowment Fund
- LCCF (Agency): Helena Area Community Foundation Agency Fund

ENDOWMENT GROWTH

Growing our endowments results in more funding available for grant making and emergency relief funding to help support nonprofits in the surrounding Helena area. Here's how it could work!

Transfer of wealth between generations of Montanans could produce as much as **\$2.7 Billion by 2030** in Lewis and Clark County alone.



If 5% of this wealth was endowed within community foundations, **\$6 Million would be available every year** to support grant making and funding!

Join us in building HACF's endowment by visiting www.HelenaAreaCommunityFoundation.org or contact our office at 406-441-4955.

Now and Forever Campaign

In 2022, HACF launched a new way to support our community - **The Now and Forever Campaign**

Participating in the **Now and Forever Campaign** entails a five-year-pledge to the Helena Area Community Foundation, during which your annual contribution transitions from supporting our general operations to supporting HACF's permanent endowment.

At the end of five years, half of your total gift will have gone to the annual operating fund (Now) and the other half to the permanent endowment (Forever).

Participation in this campaign is one of the most influential ways you can support your local community foundation.

Begin your Now and Forever pledge today by contacting HACF at 406-441-4955.



The Helena Area Community Foundation inspires and leads collaboration and investment for compassionate, safe, healthy, and resilient communities. **Now and Forever.**



Year One
100% of your gift goes to HACF's General Operating Budget



Year Two
75% of your gift goes to HACF's General Operating and 25% goes to the Endowment



Year Three
50% of your gift goes to HACF's General Operating and 50% goes to the Endowment



Year Four
25% of your gift goes to HACF's General Operating and 75% goes to the Endowment



Year Five
100% of your gift goes to HACF's Endowment

■ General Operating Budget ■ Endowment

Thank you to our community!





HELENA AREA
**COMMUNITY
FOUNDATION**

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Helena, MT 59624

Physical Address:
901 N Benton Ave
Helena, MT 59601

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