



HACF 2023 Board of Directors

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What makes the Helena Area Community Foundation different from other charitable organizations?

01 — 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.

02 — 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 now and forever

O3 — 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.

04 — 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

As I reflect on the past year, one thing is clear: there is still so much work to be done. The Helena Area Community Foundation (HACF) remains focused on addressing our community's most pressing needs, while also preserving and supporting the things that make Helena a unique and marvelous place to call home. This year we've empowered local organizations to tackle



Emily Frazier,
HACF
Executive
Director

critical issues head-on. We have showcased the incredible generosity of our community and the scale and impact of our local nonprofit community. We have honored those who embody the heart of giving and the power of philanthropy.

These stories are a testament to what our community can achieve together, but they also highlight the sincere need for continued action and preparation.

The challenges facing Helena are not going away, and in addition to preparing for what Helena needs now, we are also meeting the responsibility to prepare for the unknown needs of the future. Thanks to your help, we grow stronger, united and committed to a brighter future for Helena.

There is work to be done, and together, we are the ones who will do it.

A Message From Our Board President

I know I can't be the only one who feels the years since Covid have been a bit of a blur, and it seems 2023 was no different. Our local communities are struggling with housing affordability and our food banks are reporting an increased need as well. At the same time, we are back to enjoying the gatherings and events that make our communities so special. We are also blessed to have organizations supporting mental health wellbeing and increased opportunities for outdoor recreation and the fine arts. Behind the scenes of these efforts and what makes our communities shine are our amazing nonprofits. There are more than 100 nonprofits that HACF has impacted this year.

Kim Lloyd, HACF Board President 2023

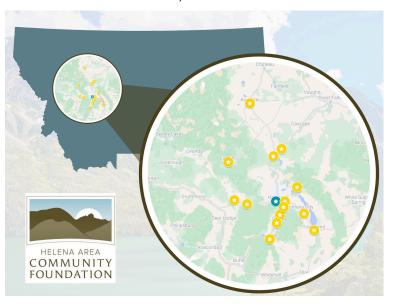


From our Annual Grant Cycle, to Greater Helena Gives, to our Emergency Relief Fund, more than \$370,000 was made available directly in Helena area. We thank the City and County for their partnership, donors, and event participants for their support, and of course none of this would have been possible without our endowment fund, which Helena Community Foundation is committed to growing Now. And Forever.

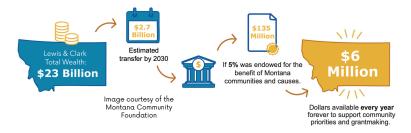
Supporting the Greater Helena Area

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.



The 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!

The Transfer of Wealth Study, conducted by the Montana Community Foundation, estimates the total wealth of Montana at \$290 billion. \$37 billion will transfer from one generation to another by 2030.

We have had opportunities like this before, and have missed them.

If community foundations had been able to retain 5% of the wealth that existed in Helena in the 1880s and 1890s, we would currently be granting at least \$8 million into our community each year. Can you imagine? By 2023, we would have been able to support this community with more than \$10 billion from endowment distributions.

Taking advantage of this transfer of wealth now would allow community foundations like HACF to make up for the missed opportunities of the gold rush years.

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 distribute HACF's endowment. 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.

2023 Grant Making Breakdown

In 2023, HACF distributed the following amounts for grants to local nonprofits:

\$30,001

HACF Endowment Funded Grants

\$42,750

City of Helena and Lewis and Clark County Grants

\$23,677

Iron Front Emergency Relief
Funds

\$72,751 Total Grant
Funding and \$23,677 in
Emergency Relief
Funding

2023 Grantees

Funding for 2023 totaled \$72,751 and was provided by HACF in the amount of \$30,001; Lewis and Clark County in the amount of \$23,750; and the City of Helena in the amount of \$19,000. The grant cycle opened on March 6, 2023 and closed on March 30, 2023. Forty grant applications received funding in the 2023 grant cycle.

The Helena Area Community Foundation provided \$30,001 in grants to nonprofits in the following amounts:

- American Jobs for America's Youth Montana: \$1,000
- Big Brothers Big Sisters of Central Jeremy Bullock Memorial Trust: \$1,250 Montana: \$1,000
- Career Training Institute: \$300
- Catholic Social Services of Montana: \$925
- Child Care Connections: \$1,000
- Cohesion Dance Project, Inc: \$1.000
- Colman Community Services: \$500
- ExplorationWorks: \$1,000
- First Judicial District CASA/GAL Program, Inc.: \$2,000
- Florence Crittenton Family Services: \$560
- GFWC Helena Woman's Club: \$500
- Grandstreet Theatre: \$1,000
- Helena Area Friends of Pets: \$500 Treasure State Runners: \$250
- Helena Education Foundation: \$1600
- Helena Food Share: \$890
- Helena Lions Swim Team: \$1,000
- Holter Museum of Art: \$250

- Ironhorse Consortium for Young Musicians: \$500
- Last Chance Curling Club: \$250
- Lewis & Clark Humane Society: \$500
- Lewis & Clark Literacy Council: \$600
- Life Houses Inc: \$1,000
- Margaret Stuart Youth Home: \$750
- Montana Living History Program: \$500
- Montana Playwrights Network: \$252
- Montana Renewable Energy Association: \$100
- Montana Shares: \$100
- Mountain Health Gives: \$1.000
- Preserve Montana: \$1,000
- RESILIENT HELENA: \$500
- Rocky Mountain Development Council, Inc.: \$500
- The Angel Fund: \$500
- The Friendship Center: \$1,000
- United Way of the Lewis and Clark Area: \$750
- West Mont: \$1,000
- Wild Montana: \$1.000
- York Volunteer Fire Department: \$1,174
- YWCA Helena: \$500

Grantee Stories

Wild Montana

Through this project, Wild Montana sought to improve the Indian Meadows Trail and Priest Pass trails for the use and enjoyment of the Lewis and Clark County community. These efforts were highly successful!

Cumulatively, between the two project sites, trail crews improved 7.7 miles of trail, installed 10 trail signs, cleaned/installed 107 drains, and created 2.270 feet of new trail. Nineteen volunteers contributed 441 hours, equating to a value of \$12,608 in volunteer labor to improve trails on public lands in Lewis and Clark County.

> **Mission: Uniting** and mobilizing communities to keep Montana wild.





Mission: Striving to continue to improve school safety by ensuring all youth have positive and safe learning environments, and by providing educators and community stakeholders with the tools and professional development to promote a healthy school culture.

The Jeremy Bullock **Memorial Trust**

This grant was used to support the 2023 Jeremy Bullock Safe Schools Summit at Central Elementary School to improve school safety measures and readiness in Montana and throughout Helena and Lewis & Clark County. About 50 Helena School Resource Officers and School District staff attended in addition to over 30 schools and districts in attendance, including 2 Tribal schools. The Summit potentially positively impacted over 1800 Montana youth by providing attendees with best practices, tools, and resources to ensure safer learning environments for all our students.

2023 Grantees - City of Helena Funding

The City of Helena provided \$19,000 in grants to nonprofits in the following amounts:



• American Jobs for America's Youth Montana: \$2,000

Career Training Institute: \$2,000Child Care Connections: \$2,000

• First Judicial District CASA/GAL Program, Inc.: \$2,000

• Grandstreet Theatre: \$1,000

• Helena Education Foundation: \$400

• Helena Food Share: \$2,000

• Lewis & Clark Literacy Council: \$600

• Life Houses Inc: \$2,000

• Mountain Health Gives: \$1,000

West Mont: \$1,000Wild Montana: \$1,000YWCA Helena: \$2,000



Grantee Stories

Helena Food Share

"These grant funds were used to repair our Crown SX3000–30 walk behind lift. The lift had a full overhaul including a new battery and charger; brakes, wheels, and tires; and a new drive axle.

"Repairs on the lift allowed Helena Food Share to safely move the 13,000 pounds of canned goods we received at Symphony Under the Stars, the dozens of food drives that happen around the city, and the 500 turkeys we received at the Turkey Challenge this year. This lift moves a very large percentage of the food that makes it to our customers every year. (And also, all of our lower backs thank you!)"







Mission: To brighten Helena,
Montana and elevate the
human spirit through live
theatre and theatre
education.

Grandstreet Theatre

Funds were used to replace the curtain and track separating the theatre from the lobby.

"We needed to replace this curtain to be in line with current fire codes. Additionally, we were looking to create a better experience for our volunteers and audience members, as the old curtain and track were worn, noisy, inefficient and often got stuck. The new curtain and track has exceeded our expectations. Not only is the new track quiet and easy to use, the new curtains are significantly thicker than the old set. They are helpful in blocking out noise from the lobby and the street, and in keeping the heat or AC in the main auditorium space."

2023 Grantees - Lewis and Clark County Funding

Lewis and Clark County provided \$23,750 in grants to nonprofits in the following amounts:



- Big Brothers Big Sisters of Central Montana: \$1600
- Catholic Social Services of Montana: \$1.075
- Cohesion Dance Project, Inc: \$2,000
- Colman Community Services: \$1,500
- ExplorationWorks: \$1,000
- Florence Crittenton Family Services: \$1,000
- GFWC Helena Woman's Club: \$1500
- Helena Area Friends of Pets: \$500
- Helena Lions Swim Team: \$225
- Ironhorse Consortium for Young Musicians: \$1.500

- Jeremy Bullock Memorial Trust:
 \$1.250
- Lewis & Clark Humane Society: \$500
- Margaret Stuart Youth Home: \$750
- Montana Playwrights Network: \$800
- Montana Renewable Energy Association: \$900
- Montana Shares: \$900
- Preserve Montana: \$1,000
- RESILIENT HELENA: \$500
- Rocky Mountain Development Council, Inc.: \$2,000
- The Angel Fund: \$500
- The Friendship Center: \$2,000
- United Way of the Lewis and Clark Area: \$750



Grantee Stories

Margaret Stuart Youth Home

"These funds were used as Special Activities funds to facilitate healing and bonding time between our traumainformed staff and the kids who call MSYH home.

"Thanks to your grant, we were able to create an entirely new space for relationship, education, and creativity for the kids at our home. Normally, the outcomes of our programs are intangible—but not our garden. It was such a joy for staff and kids alike to watch as our garden and our kids evolved this summer."

Mission: To help every youth feel safe, have a sense of belonging and find a place to call home.





Mission: To provide a safe haven for those affected by domestic violence, sexual assault, and stalking and to empower our community to flourish in relationships free from violence.

The Friendship Center

Funds specifically supported The Friendship Center's 24-hour crisis line. Programmatic costs include phone equipment, phone service costs, volunteer stipend for crisis line volunteers, staff stipend, payroll for the Crisis Line Program Support Assistant, costs associated with volunteer coordination and training, crisis response materials, and volunteer appreciation.

"We anticipated receiving 1,200 calls from 600 individuals in 2023. At the beginning of 2023, TFC integrated a new helpline database interface and case management system that has improved our ability to accurately capture the number of crisis line calls we receive and subsequent instances of crisis intervention or services provided. Throughout 2023 we received 1,330 calls from 1,025 individuals."

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.



Greater Helena Gives

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.



Steve Browning "Spirit of Philanthropy" Award

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.



Helena Holiday Cruise

HACF hosts the annual Helena Holiday Cruise, a fun family event to view Helena's Christmas lights from the comfort of the Last Chance Trolley (or your own vehicle) while enjoying local treats and cocoa!

Greater Helena Gives

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 3rd-4th, donors made donations to over 100 nonprofits, and could make multiple gifts in a single donation. With prizes for nonprofit participants awarded throughout the day, all participants feel engaged and all the nonprofits are winners!





\$275,000
raised in 24 hours for our
nonprofit friends!



Thank you to everyone who participated in Greater Helena Gives!

Thank You To Our 2023 Corporate Sponsors!

Presenting Sponsor Opportunity Bank of Montana

Legacy SponsorsBrowning Kaleczyc Berry

& Hoven P.C.

Farmers State Bank

Media Sponsors

Montana Radio Company

Montana Television Network

Trusted Sponsors St. Peter's Health

TDS

Sullivan Financial Group

Treasured Sponsors

Robert Peccia and Associates

Blackfoot River Brewing

Supporting Sponsors

Scenic Brew

Big Dipper Ice Cream



Ross and Joe Duncan are long-time members of the Helena community. Ross is a third generation Helena native and recently retired as President & CEO of Valley Bank, ending a 44-year career in banking. She has also enjoyed 25 years as the top-rated leadership instructor at PCBS, the graduate school of banking at the University of Washington.

Born in Kingston, New York, Joe graduated with a degree in Finance from Colorado State, then returned home to begin his banking career as a commercial lender. Joe later abandoned his career in banking to move to Montana where he has enjoyed another successful career as a builder. Ross and Joe have one son and one daughter. The family enjoys everything outdoors and has a special affinity for sporting clays.

Ross and Joe both place a high value on family and community and have been committed to giving back to the place they call home. Their interests include children, basic needs, our Montana lifestyle, and future sustainability. Their support has impacted many, many local organizations including the Friendship Center, Saint Peter's Health, Angel Fund, Big Brothers Big Sisters, Carroll College, Good Samaritan, Growing Friends, Habitat for Humanity, Helena Area Community Foundation, Helena Education Foundation, Helena Food Share, Intermountain, Pads for Paws, Shodair Children's Hospital, United Way, and various outdoor and sporting organizations.

Helena Holiday Cruise

HACF proudly hosted the annual Helena Holiday Cruise, a beloved family tradition where participants enjoyed a magical tour of Helena's Christmas lights. From the warmth of their vehicles or aboard the festive Trolly, attendees were treated to hot cocoa or cider, creating cherished holiday memories for all.



Thank You To Our 2023 Corporate Sponsors!

"The Star on the Top of the Tree" Presenting Sponsor

Browning Kaleczyc
Berry & Hoven P.C.

"Greatest Gift" Sponsor
St. Peter's Health

Cookies and Cocoa Sponsors

D.A. Davidson

Media Sponsor Montana Radio Company

> **Event Host** Scenic Brew

Pinion Technology Core

Nonprofit Collaborative Convenings

Powered by the Helena Area Community Foundation, these monthly gatherings include educational sessions, networking opportunities, and ways for our nonprofit leaders to work together to share best practices and increase collabration.

The Helena Nonprofit Executive Network's mission is to provide a forum of networking and learning for Helena area executive leaders on issues and concerns that nonprofit organizations and their leaders face.

In addition to monthly gatherings, HNEN's listserv is also utilized as a way to share information among nonprofit peers, including job openings, announcements, grant opportunities, or other information relevant to Helena area nonprofit leaders.





The Helena Development Roundtable (HDR)* is an informal network of executive development fundraising staff and Board members who meet monthly for no-cost seminars on fundraising skills. HDR provides valuable opportunities for networking relationship building, as well as skill development. Participants pick each month's fundraising topics, such as monthly giving programs, pint night fundraisers at local breweries, and on-line fundraising. For staff who are new to Helena, HDR provides ready access to a talented and supportive peer network.

Nonprofit of the Month

In September 2023, HACF launched the "Nonprofit of the Month" program in partnership with local nonprofits. Each month, we spotlight a different organization, on multiple channels including Facebook, email, YouTube and sometimes in-person to help the community learn about their mission and upcoming initiatives. The program has been so successful that we're already booked through 2025!



Ask me Anything, or AMA, videos allow our viewers to ask their important questions, and gives nonprofits the chance to reach new audiences. With so many places to support in Helena, it is our goal to make sure important voices are never lost!

2023 Featured Nonprofits





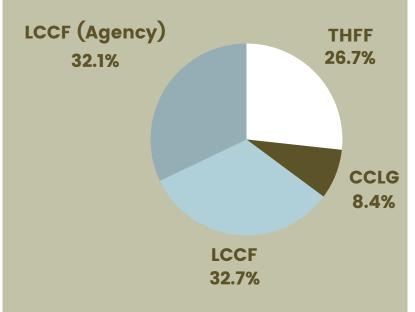




^{*}The Helena Development Roundtable was originally a project of the Big Sky Institute for the Advancement of Nonprofits (BSI) prior to its dissolution.

Endowment Composition

HACF receives distributions from \$1 million held in endowments by the Montana Community Foundation for the benefit of HACF. HACF received \$ in distributions from the endowments in 2023. 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

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.

We are seeking additional participants in the Now and Forever Campaign! For more information, please contact our office at 406-441-4955.



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



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



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



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



100% of your gift goes to HACF's Endowment

Endowment

General Operating Budget

Financial Summary

Helena Area Community Foundation	Summa		
Profit and Loss			
January - December 2023			
•			
	Total	1	
	Jan - Dec 2023	Jan - Dec 2022 (PY)	
-	s	s	
Total Revenue	214,887.33	161,996.18	
Expenses			
Personnel Expense	\$ 117,335.62	\$ 68,747.90	
Office Expense	\$ 84,952.12	\$ 74,017.99	
Total Expenses	\$ 202,287.74	\$ 142,765.89	
Net Operating Income	\$ 12,599.59	\$ 19,230.29	
Other Income			
4300 Grants received			
4310 Grants-LCCF Endow, UN	13,738.66	13,090.51	
4315 Grants-THFF Endow, UN	13,784.70	13,360.52	
4330 Grants-CCLG Endow, TR intern	4,346.87	4,210.87	
4335 Grants - Other	45,000.00	447,000.00	
4345 Grant - Permanent Stage	1,121.25		
4350 Restricted Emergency Funding	22,375.85		
Total 4300 Grants received	\$ 100,367.33	\$ 477,661.90	
4500 MCF Agency Income			
4510 Agency Endowments-Interest	3,759.34	4,354.07	
4550 Agency Endowments-Realized G/L	2,466.26	8,087.59	
5090 Agency endowments-Inv mngmt fee	-4,329.08	-4,560.85	
Total 4500 MCF Agency Income	\$ 1,896.52	\$ 7,880.81	
Total Other Income	\$ 102,263.85	\$ 485,542.71	
Other Expenses			
5021 Donor Events		2,541.00	
5160 Grant expense	85,883.00	460,619.62	
5170 Grants-GHG	20,099.42	21,406.86	
5180 GHG Prizes	2,697.18	2,950.00	
5190 Realized Gain or Loss on Sale of Stock	-6.94	-934.34	
Total Other Expenses	\$ 108,672.66	\$ 486,583.14	
Net Other Income	-\$ 6,408.81	-\$ 1,040.43	
Net Income	\$ 6,190.78	\$ 18,189.86	

Financial Summary

Helena Area Community Foundation	n (New)			
Balance Sheet				
As of December 31, 2023				
	Total			
	As of Dec 31, 2023	As of Dec 31, 2022 (PY)		
ASSETS				
Total Current Assets	\$ 170,762.19	\$ 177,391.41		
Total Other Assets	\$ 353,886.45	\$ 335,087.10		
TOTAL ASSETS	\$ 525,648.63	\$ 512,478.51		
LIABILITIES AND EQUITY				
Total Liabilities	\$ 9,691.87	\$ 7,183.60		
Equity				
3000 Unrestricted Net Assets	147,051.61	176,196.10		
3300 Perm. restricted net assets	353,886.45	335,087.10		
3400 Unrealized Gain/Loss on Endowment	9,927.92	-23,078.15		
Opening Balance Equity	-1,100.00	-1,100.00		
Net Income	6,190.78	18,189.86		
Total Equity	\$ 515,956.76	\$ 505,294.91		
TOTAL LIABILITIES AND EQUITY	\$ 525,648.63	\$ 512,478.51		





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