HELENA AREA COMMUNITY FOUNDATION

Collective Capacity Cohort: Unhoused Helena

Progress Report, Findings, and Recommended Next Steps

October 2026

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1. Executive Summary

In August 2023, the City of Helena committed $100,000 toward identifying solutions for emergency shelter for unhoused members of our community. In 2025, the Helena Area Community Foundation (HACF) proposed a phased approach to that investment: strengthen the capacity of organizations working within Helena's housing and homelessness system, bring those organizations together to better understand the system and its gaps, and ultimately develop a collaborative approach for investing the remaining $50,000.

The approach recognized from the outset that homelessness is a complex community challenge. Emergency shelter intersects with housing availability, mental and behavioral health, economic instability, domestic violence, substance use, health care, public safety, transportation, and many other systems. No single organization, funding source, or intervention can address all of those factors.

For that reason, HACF proposed beginning not with a predetermined project, but with collaboration and capacity building among the organizations already working with the unhoused in Helena.

The project began with an assessment of Helena-area organizations working in housing, homelessness, and related services. Twenty-one organizations received the assessment and 12 responded. The assessment identified significant existing expertise and resources, but also important gaps. Among respondents, overnight emergency shelter was limited to two organizations serving specifically defined populations. Few truly low-barrier options were identified. Respondents also identified affordable housing shortages and challenges with communication and coordination among agencies.

Six organizations were selected to participate in the Collective Capacity Cohort:

- Good Samaritan Ministries
- Rocky Mountain Development Council
- YWCA Helena
- FUSE at St. Peter's Health
- United Way of the Lewis & Clark Area
- Family Promise of Greater Helena

Since March, participants have worked through a structured process combining organizational capacity building with systems-level learning. The cohort examined Helena's existing services and gaps, local data, evidence-based and trauma-informed practices, organizational readiness, fundraising and sustainability, and opportunities for greater coordination. As the work moved toward recommendations, HACF also began outreach beyond the participating organizations to bring additional community perspectives into the process.

Over the course of that work, the conversation became increasingly focused on a practical question:

Where does someone go on a cold February night?

That question helped move the cohort from a broad discussion about homelessness toward a more defined community challenge: Helena lacks sufficient emergency shelter options for people who do not fit within existing programs, particularly options that are low-barrier and connected to appropriate wraparound services.

At the same time, participants recognized that Helena's immediate winter shelter needs cannot wait for development of a permanent solution.

The cohort therefore recommends a two-part use of the remaining $50,000 in Phase III funding.

Approximately $20,000 would strengthen immediate Code Blue capacity, investing in the work of the TriCounty COAD's Emergency Shelter program, including helping participating churches address requirements for temporary shelter operations and obtain supplies or other resources necessary for winter shelter.

Approximately $30,000 would create continuity and momentum around development of a long-term shelter solution. The current cohort would transition into a broader community coalition convened by United Way of the Lewis & Clark Area. HACF would participate as one member of that coalition alongside current cohort organizations and additional community partners.

The coalition would carry the work into 2027 to develop the community, financial, governance, and organizational infrastructure necessary for a new nonprofit focused on a sustainable shelter solution. Additional feasibility and planning work would help validate and refine that model.

The formal cohort convenings will conclude on October 29. Final deliverables will include donor-facing cases for support developed by participating organizations and a shared case for support for a new low-barrier shelter. The shared case will be designed as a community resource that participating organizations, the future coalition, funders, public partners, and other entities can use as the work moves into fundraising, grant development, planning, and implementation.

The proposed Phase III investment therefore serves as a bridge: addressing an immediate winter need while preserving the relationships, knowledge, and momentum necessary to pursue a longer-term solution.

2. Background and Original Scope

On August 7, 2023, the City of Helena agreed to allocate $100,000 toward identifying solutions for emergency shelter for unhoused members of the community.

HACF subsequently proposed a cohort-based capacity-building and collective-impact initiative. The proposal reflected an important reality: Helena already has organizations with significant expertise in housing, health care, family services, domestic violence, case management, basic needs, and related services. At the same time, those organizations operate with different missions, eligibility requirements, funding sources, and organizational capacities. When approached prior to October 2025, the organizations reached out to reported concerns with capacity and infrastructure, and therefore no single organization was able to put forth a proposal that addressed the community need.

HACF's goal was not to assume that one of those organizations should simply take on an additional service. Instead, HACF proposed creating the time and structure necessary for participating organizations to understand the system together, strengthen their own capacity, identify gaps, and determine where collaborative investment could have the greatest impact.

HACF's role has been to serve as a neutral convener rather than a direct-service provider. The Foundation has coordinated the assessment, cohort process, capacity-building work, community outreach, and collaborative planning.

The project was structured in three phases:

Phase	Purpose	City Investment
Phase I	Assessment and Cohort Building	$10,000
Phase II	Cohort Educational Sessions	$20,000
Phase II	Nonprofit Participation Incentives	$20,000
Phase III	Collaborative Solution Funding Pool	$50,000
Total		$100,000

The original proposal anticipated that the first phases would inform the use of the final $50,000. This was intentional. Rather than selecting a project before completing the assessment and collaborative work, the process allowed the eventual recommendation to develop from what participating organizations learned.

The original HACF proposal is included as Attachment A.

Detailed accounting of City funds received, expended, committed, and remaining continues to be provided through HACF's separate quarterly financial reports and is not duplicated in this narrative report.

3. Assessment and Cohort Development

In December 2025, HACF distributed a 22-question assessment to 21 Helena-area organizations working in housing, homelessness, and related services. This process was led by Katie Loveland of Loveland Consulting, who has extensive experience in housing assessments. Twelve organizations responded. It is worth noting that God's Love was one of the organizations who declined to participate.

The assessment was intended both to establish a baseline understanding of Helena's service landscape and to identify organizations interested in participating in a deeper capacity-building and collaborative process.

Several findings became particularly relevant to the work that followed.

Among respondents, overnight emergency shelter was limited to two organizations, both serving specifically defined populations. Few truly low-barrier options were identified. Respondents specifically identified limited low-barrier emergency shelter, particularly during periods of extreme cold, as a community challenge.

Affordable housing availability was also consistently identified as a significant barrier. Even when organizations can help people stabilize or navigate services, the lack of available and affordable housing limits the options available to both individuals and service providers.

This shows meaningful gaps on both ends of the continuum: our community lacks a starting point for those without housing, and those receiving services may not have housing available to move into after their programmatic support ends. Thus, Helena is seeing an increase in those living on the street, and organizations who have 'emergency' shelter beds that are occupied for years.

The assessment also identified opportunities to improve communication and coordination among organizations. Respondents generally valued cross-sector collaboration, but organizations differed in their capacity or readiness to jointly design programs, pursue shared funding, or take on additional services.

Respondents noted the lack of a shared community vision for addressing shelter and housing instability, reflected in the range of approaches pursued in recent years. Without consensus around a common goal or project, organizations have largely worked to address individual pieces of the challenge within their own missions, resources, and capacity. While these efforts have responded to real needs, they have not always been connected to a broader community strategy. When individual projects have stalled or failed to gain sufficient support, the result has reinforced a perception that meaningful progress on shelter in Helena is difficult—or even impossible

Finally, the assessment identified differences in organizational fundraising capacity. Participating organizations brought varying levels of experience with major gifts, donor relationships, storytelling, diversified funding, and long-term sustainability.

These findings helped shape the cohort's dual focus: strengthen the organizations individually while also strengthening their ability to work collectively.

The assessment summary is included as Attachment B.

4. Collective Capacity Cohort: From Learning to Action

The cohort was designed as a progression:

Build trust → Strengthen organizations → Align efforts → Invest together → Improve outcomes

The sessions were not intended to function as a series of stand-alone trainings. Each built on the work before it, gradually moving participants from relationship-building and organizational capacity toward a shared understanding of the community's shelter needs and potential responses. The group met initially in March 2026 for a brief orientation and to set a schedule for future meetings.

April 15: Building Trust and Shared Purpose

The first session focused on establishing relationships, shared expectations, and a common understanding of the work.

Participants began from several principles: housing instability and emergency shelter are significant community challenges; no single organization can solve them alone; organizational capacity affects the ability of the entire system to respond; and sustainable progress requires trust and a willingness to look beyond individual organizational roles.

May 29: Mapping Services and Identifying Gaps

The May session moved from relationship-building toward understanding Helena's existing service system.

Participants mapped available services, considered where programs overlapped or complemented one another, and examined where people could fall through gaps. Particular attention was given to low-barrier services and to individuals who may not qualify for existing shelter or housing programs.

This work reinforced the distinction between having many organizations working on housing-related issues and having a complete emergency response system.

June 18: Organizational Readiness, Evidence, and Community Data

The June session combined systems-level learning with organizational development.

Participants examined local housing and homelessness data, discussed evidence-based approaches, and considered where community assumptions aligned—or did not align—with available evidence and local experience.

The organizational-capacity component introduced the core elements of a case for support and began helping participating organizations articulate their need, accomplishments, future vision, and opportunities for philanthropic investment.

July 10: Trauma-Informed Practice, Storytelling, and Sustainability

The July session explored trauma-informed organizational practice and communication.

Participants considered how policies, services, and storytelling can support dignity and agency while avoiding narratives that oversimplify the experiences of people facing housing instability.

The cohort also continued its fundraising work, including organizational themes, budgets, gift opportunities, donor communication, and development of individual cases for support.

August 20: From Collaboration to Action

August marked a significant transition from learning toward collaborative problem-solving.

Participants worked through a scenario titled "A Cold February Night." The exercise asked a practical question: what happens today when someone suddenly needs a safe place to stay during severe winter weather?

The cohort examined what resources exist, where referrals can be made, where eligibility requirements create barriers, where coordination breaks down, and what happens when no existing option fits.

City of Helena planning representatives joined the session to discuss the City's role, potential public/nonprofit/philanthropic partnerships, barriers, and opportunities.

By this point, the cohort was increasingly aligned around several characteristics important to an effective emergency shelter response: low-barrier access, trauma-informed and evidence-based practice, and strong connections to wraparound services.

The conversation had moved from a broad question—"How do we address homelessness?"—toward a more actionable one:

What does Helena need in order to provide an effective emergency shelter response, and what infrastructure will be necessary to sustain it?

October 1: From Cohort to Coalition

The October 1 session (rescheduled from September 17 2026) focused on moving from shared understanding toward shared commitments.

Participants discussed how the remaining City investment could respond to immediate needs while also advancing the longer-term work. That discussion helped refine the two-part Phase III recommendation described later in this report: approximately $20,000 for immediate Code Blue capacity and approximately $30,000 to maintain momentum around development of a sustainable shelter solution.

The session also addressed what should happen after the HACF-led cohort concludes.

Participants agreed that the relationships and shared direction developed through the cohort should not simply end with the final session. Instead, the work should transition into a broader community coalition in 2027.

United Way of the Lewis & Clark Area will serve as convener of that coalition. HACF will remain involved as a member, along with current cohort organizations and additional community partners.

This represents a deliberate transition of ownership rather than an extension of HACF's role as cohort convener.

The October session also included review of initial community outreach and extended practice of the individual organizational cases for support.

October 29: Scheduled

The upcoming (as of this writing) session will wrap up the cohort training sessions with presentations of individual cases for support from the participating nonprofits and sharing the draft of the shelter focused case for support.

5. Community Outreach and Additional Perspectives

As the cohort moved from learning toward recommendations, HACF began seeking perspectives beyond the six participating organizations.

Initial outreach has included members of Helena's downtown business community. Downtown businesses experience some of the visible impacts associated with people having nowhere appropriate to go, and their perspectives provide important context for understanding how gaps in Helena's current system affect the broader community.

The purpose of this outreach was not to treat business perspectives as a substitute for the voices of people experiencing homelessness or the expertise of service providers. Rather, it was an opportunity to better understand how the lack of adequate shelter and services is experienced across the community and to identify concerns and considerations that should inform future planning.

What We Heard

HACF sent out business response forms out to 168 businesses in the downtown Helena area. These forms allowed businesses to share if they were interested in

- Receiving updates about the cohort and its work
- Participating in a future business listening session or conversation
- Sharing experiences or concerns one-on-one
- Learning more about potential community solutions, or
- Declaring they are not ready to participate.

Additionally it posed two open ended questions:

1. What is one thing you wish people serving the unhoused in Helena better understood about the experience of downtown businesses? And,
2. Anything else you'd like us to know?

To date we have received 12 responses.

General themes included:

- Recognition of the visibility of Helena's homelessness
- Feelings of being inadequately resourced to respond to the needs of the homeless
- Compassion, and desire to be supportive and to find solutions for the people impacted
- Concerns about loss of business and discomfort of customers

Quotes directly from response forms:

"It's commonly brought up it is an issue. Their presence at the entrance to downtown, presence on many corners and intersections, and occasional drug use or belongings left in garages and sidewalks…parking and unhoused are two consistent issues for visiting downtown."

"While I think business owners and our employees are compassionate towards the homeless population, we are unequipped to deal with the mental issues that frequently accompany them as well as their physical needs—particularly bathroom needs and shelter."

"Because of the lack of resources for our unsheltered neighbors, [Redacted Business] has lost business, had to manage violent events, and have put employees at risk. We want to be part of a compassionate solution."

These perspectives can help inform the next phase of work, but they represent only one part of the community conversation that will be necessary.

Broader engagement should be a priority as the work transitions from the cohort into a community coalition. That process should intentionally include people with lived experience of homelessness or housing instability, service providers, health-care partners, local government, businesses, faith communities, funders, neighborhood and community representatives, and others who will be affected by or contribute to a future shelter response.

This broader engagement will be particularly important as the coalition begins to address questions about shelter model, services, location, governance, community impact, and long-term sustainability.

6. Outcomes and Findings

The most significant outcomes of the cohort are not limited to a single proposed project. The process has strengthened both individual organizations and the community's ability to approach the emergency shelter gap collectively.

Stronger Organizational Capacity

Participating organizations have received structured training and coaching in fundraising, storytelling, organizational readiness, and sustainability.

Each participating organization will leave the cohort with a donor-facing case for support that articulates its need, mission, programs, accomplishments, future vision, financial needs, gift opportunities, leadership, and other elements important to effective fundraising.

This work responds directly to organizational-capacity needs identified in the original assessment and creates resources participants can continue using beyond the end of the cohort.

Stronger Relationships and Shared Understanding

The cohort has provided sustained time for organizations to move beyond individual referrals and program-specific concerns toward understanding Helena's broader system.

Participants have developed a stronger understanding of what other organizations do, where services connect, where eligibility or capacity creates gaps, and where collaboration could improve the community response.

Those relationships are an important form of infrastructure. They create a stronger foundation for future planning than beginning a shelter initiative with a new group of organizations unfamiliar with one another's work.

Greater Clarity About the Emergency Shelter Gap

The cohort was intentionally not convened around a predetermined solution.

That makes the convergence around emergency shelter significant.

Through assessment, systems mapping, local data, initial community outreach, and repeated discussion, participants increasingly focused on the lack of sufficient emergency shelter options—particularly low-barrier options for people who do not fit within existing programs.

The process also created greater clarity about what a future response should consider. Participants consistently identified low-barrier access, trauma-informed and evidence-based

practice, connections to wraparound services, and long-term operational sustainability as important.

Immediate Need and Long-Term Need Are Both Real

One of the clearest conclusions of the cohort is that Helena's immediate and long-term shelter needs should not be treated as competing priorities.

Code Blue/TriCounty COAD and temporary faith-community responses can provide critical shelter during dangerous winter weather. Strengthening those efforts can have an immediate impact.

At the same time, temporary winter responses cannot substitute for a sustainable emergency shelter strategy.

The cohort's Phase III recommendation intentionally addresses both realities.

The Work Needs a Structure Beyond the Cohort

The cohort was always intended to be time-limited.

As the work progressed, however, it became clear that moving from an identified gap to an operating shelter will require additional planning, broader community engagement, fundraising, governance development, and technical work.

Rather than ending the project and requiring that work to begin again later, the cohort has identified a mechanism for maintaining continuity through a broader coalition convened by United Way of the Lewis & Clark Area.

7. Phase III: Proposed Use of the Remaining $50,000

The original proposal reserved $50,000 for a collaborative solution identified through the cohort process.

Based on the work completed to date, the cohort recommends dividing that investment between an immediate winter response and continued development of a longer-term solution.

Approximately $20,000: Immediate Code Blue/COAD Emergency Shelter Support

The cohort recommends allocating approximately $20,000 to strengthen Helena's Code Blue/COAD Emergency Shelter response.

Faith communities already participating in Code Blue provide an important emergency resource during periods of severe winter weather. During the last winter, one church was cleared to serve as an overnight shelter. Two other churches are currently in the pipeline to be approved, but face facility, code, supply, equipment, or other practical needs that limit their ability to provide temporary shelter.

The proposed funding could help participating churches address applicable requirements for temporary shelter operations and obtain supplies, equipment, or other resources necessary to strengthen short-term winter capacity.

This investment responds to the cohort's practical "cold February night" question with an action that can make a difference this winter.

It is not intended to substitute for development of a permanent shelter solution.

Approximately $30,000: Continuity and Long-Term Shelter Development

The cohort recommends committing the remaining approximately $30,000 to the next phase of longer-term shelter development.

The current cohort would transition into a broader community coalition convened by United Way of the Lewis & Clark Area. The funding would provide resources for that coalition to maintain momentum and continue moving the project from an identified community need toward an implementable solution.

Potential uses include:

- Feasibility or project-assessment work;
- Continued community outreach and engagement;
- Coalition development and facilitation;

- Fundraising planning and donor development;
- Grant research, development, and applications;
- Governance and organizational development;
- Legal or other professional assistance; and
- Planning and startup activities necessary to move the project toward implementation.

The intent is for the approximately $30,000 to be committed for this purpose in 2026 while allowing the work itself to continue into 2027.

The coalition should also actively pursue other public and philanthropic resources. The City's remaining investment is meaningful, but it will not independently fund the planning, capital, startup, and operating costs associated with a sustainable shelter.

Its greatest value may be as catalytic funding that allows the community to organize the project, answer critical questions, and leverage additional investment.

8. From Cohort to Coalition

The transition from cohort to coalition is a significant next step.

The Collective Capacity Cohort was designed around six organizations and a defined learning process. A coalition focused on developing a shelter will need a broader purpose and broader participation.

United Way of the Lewis & Clark Area will serve as convener beginning in 2027. HACF will participate as one member, providing continuity and institutional knowledge without continuing to lead outside our capacity or expertise.

The coalition will include current cohort participants while expanding participation to other organizations and individuals whose expertise or perspective will be necessary to the work. This may include people with lived experience of homelessness or housing instability, nonprofit and health-care representatives, faith communities, businesses, funders, local government, and individuals with legal, financial, property, construction, governance, or other relevant expertise.

The current direction is toward developing the structure necessary for a nonprofit organization focused on a longer-term shelter solution.

That direction should be tested and refined through the next phase rather than treated as a foregone conclusion.

Questions still requiring additional work include:

- What shelter and service model best fits Helena's needs?
- What facility and location requirements would that model create?
- What are realistic capital and operating costs?
- What staffing model would be required?
- Which wraparound services should be provided directly and which should be coordinated through existing partners?
- What governance structure will provide appropriate community accountability?
- What regulatory, legal, and operational requirements must be addressed?
- What combination of public, philanthropic, and other revenue could support the project?
- What will be necessary to sustain operations over time?

If that work confirms that an independent nonprofit is the appropriate structure, the coalition can move into organizational development, including formation of a founding board, incorporation, development of governance practices, pursuit of tax-exempt status, fundraising, and eventually recruitment of organizational leadership.

The objective is not simply to create another nonprofit organization. The objective is to create the structure necessary to sustain a service that Helena currently lacks.

9. Remaining Work and Final Deliverables

The formal Collective Capacity Cohort sessions will conclude on October 29, 2026.

At the final session, participating organizations will present the cases for support they have developed during the cohort and receive final feedback from their peers. The session will also provide an opportunity to confirm shared commitments and next steps as the work transitions to the broader coalition.

The cohort process will result in two types of final deliverables.

Organizational Cases for Support

Each participating organization will complete a donor-facing case for support developed through the cohort's organizational-capacity work.

These cases are intended to strengthen the participating organizations individually and give them a practical fundraising resource they can continue refining and using with donors, funders, board members, and other stakeholders.

This is an important part of the original capacity-building purpose of the project. A stronger community response depends in part on the health and sustainability of the organizations already providing critical services.

Community Case for Support for a New Shelter

HACF is also developing a shared case for support for a new low-barrier emergency shelter for Helena.

Unlike the organizational cases, this case for support will not belong to a single organization. It will capture the community need identified through the cohort, relevant data and context, the emerging vision for a shelter response, and the case for continued community investment.

The document will be developed for shared use. Participating organizations, the future coalition, funders, public partners, and other community entities will be able to use it as the work moves into community engagement, fundraising, grant development, and implementation.

The case for support can continue to be refined as feasibility work produces more specific information about the shelter model, location, costs, governance, and operating structure. HACF will continue to update this case throughout 2027 as part of our commitment to the coalition.

Together, these deliverables reflect the two levels of capacity the project was designed to strengthen: the capacity of individual organizations and the capacity of the community to act collectively.

10. Proposed Timeline

October–December 2026

The cohort will complete its final session on October 29, including presentation and feedback on organizational cases for support.

HACF will complete the shared case for support for a new low-barrier shelter.

$20,000 will be directed toward immediate Code Blue/COAD Emergency Shelter capacity.

The current cohort will begin the formal transition to a broader coalition, with United Way of the Lewis & Clark Area preparing to assume the convening role.

The partners will also identify additional coalition participants and begin defining expectations and priorities for the next phase.

Early–Mid 2027

United Way will convene the broader community coalition, with HACF participating as a member.

The coalition will continue community engagement, undertake appropriate feasibility or project-assessment work, refine the proposed shelter and service model, and evaluate facility, operating, governance, partnership, and funding requirements.

The coalition will also pursue grants, philanthropic support, and other resources necessary for planning and implementation.

Mid–Late 2027

Based on the results of planning and feasibility work, the coalition will formalize the appropriate organizational model.

If development of a new nonprofit remains the appropriate direction, work may include establishing a founding board, developing governance structures, pursuing incorporation and tax-exempt status, building a fundraising and operating plan, and preparing for recruitment of initial leadership.

Beyond 2027

Implementation will depend on demonstrated feasibility, organizational readiness, community support, partnerships, and sufficient capital and operating resources.

The timeline should remain responsive to what is learned rather than creating artificial deadlines that could undermine the long-term sustainability of the project.

11. Recommendation and Requested City Action

The Collective Capacity Cohort recommends using the remaining $50,000 Phase III investment to address both Helena's immediate winter shelter needs and the longer-term work necessary to develop a sustainable emergency shelter response.

Specifically, HACF and the members of the Collective Capacity Cohort recommend:

1. Allocate approximately $20,000 to immediate Code Blue/COAD Emergency Shelter programming, including eligible facility needs, supplies, equipment, and other expenses that strengthen short-term winter shelter operations.
2. Commit approximately $30,000 to longer-term shelter development through the broader community coalition convened by United Way of the Lewis & Clark Area.
3. Allow the approximately $30,000 commitment to support work extending into 2027, including feasibility or project assessment, community engagement, fundraising and grant development, coalition development, governance and organizational work, and related planning and startup activities.
4. Continue leveraging the City's investment with additional public and philanthropic resources so that the remaining City funds can help catalyze a larger and more sustainable community response.

HACF requests City approval, if required under the existing agreement, for the approximately $30,000 to be committed or transferred for this defined purpose in 2026 while allowing activities supported by those funds to continue into 2027.

The proposed approach creates a bridge between immediate need and long-term change.

The approximately $20,000 Code Blue/COAD Emergency Shelter investment responds to the immediate question that helped focus the cohort's work: where can someone safely go on a dangerously cold night?

The approximately $30,000 investment protects the progress already made and gives the community a mechanism for continuing the harder work of developing a sustainable solution.

The original project was built on the premise that investing in organizational and collaborative capacity is part of solving complex community problems. The work completed to date supports that premise.

The cohort has not solved Helena's emergency shelter challenge. It has, however, moved the community forward: participating organizations are stronger; relationships and coordination have improved; the shelter gap is more clearly defined; a shared direction has emerged; and there is now a structure for carrying the work into its next phase.

The next step is to turn that shared capacity and direction into action.

Attachments

Attachment A – Original HACF Proposal to the City of Helena, July 31, 2025

HELENA AREA
COMMUNITY
FOUNDATION

Attn: Mayor Wilmot Collins
Commissioner Emily Dean, Commissioner Sean Logan, Commissioner Melinda Reed, and Commissioner Andy Shirtliff

City of Helena
316 N Park Ave
Helena, MT 59623

July 31, 2025

Re: Proposal for Collaborative Capacity Building Among Housing Nonprofits

Dear Mayor Collins and Commissioners,

On behalf of the Helena Area Community Foundation, I am pleased to share the enclosed proposal:

Collective Capacity: A Cohort-Based Approach to Strengthening Housing Nonprofits and Advancing Collective Impact in Helena

This proposal outlines a phased, cohort-based program to strengthen the effectiveness, collaboration, and sustainability of housing nonprofits in our community—organizations that are on the front lines of addressing one of Helena's most complex social issues: homelessness.

We deeply appreciate the City's prior commitment of $100,000 to identify emergency shelter solutions. This proposal seeks to build on that commitment by creating the nonprofit infrastructure necessary for meaningful, long-term progress.

Our model is designed to be flexible and adaptive, with feedback and review checkpoints built into each phase of the program. We fully recognize that this work is complex and evolving, and we welcome continued dialogue and collaboration with the City to refine this initiative based on shared goals and emerging needs.

Thank you for your ongoing commitment to supporting innovative, community-driven solutions, and for your consideration in partnering with the Helena Area Community Foundation.

With gratitude,



Emily Frazier
Executive Director
Helena Area Community Foundation
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Collective Capacity: A Cohort-Based Approach to Strengthening Housing Nonprofits and Advancing Collective Impact in Helena

A proposal for the City of Helena from the Helena Area Community Foundation

July 31, 2025

Executive Summary

The Helena Area Community Foundation (HACF) proposes to convene a cohort of housing-focused nonprofits to strengthen collective capacity and foster alignment in addressing homelessness in our community. Using a structured, time-bound model, this initiative will blend individualized nonprofit assessments with shared learning experiences rooted in the "wicked problems" framework. Participating organizations will receive capacity-building tools, small participation grants, and the opportunity to co-design a collaborative solution eligible for larger funding.

We are requesting support from the City of Helena to launch this pilot initiative, which aims to strengthen the local nonprofit sector, promote coordinated service delivery, and position our community to make meaningful progress on one of its most complex social challenges.

Background

On August 7, 2023, the City of Helena agreed to allocate $100,000 toward identifying solutions for emergency shelter for unhoused members of our community. This motion—made by Commissioner Reed and seconded by Commissioner Dean—signaled the City's commitment to working with local partners to explore collaborative, community-driven approaches to this urgent issue.

The Problem

Despite shared missions and deep dedication, housing nonprofits in Helena often work in isolation. Time constraints, limited resources, and structural silos make sustained collaboration difficult and, at times, create unhealthy competition among organizations serving similar populations. At the same time, homelessness is a multifaceted issue—intersecting with mental health, economic instability, addiction, domestic violence, and more. It is a "wicked problem"—a complex challenge that cannot be solved by any single organization, intervention, or funding stream.

We believe Helena's housing nonprofits may be ready for a new kind of support: one that meets them where they are, fosters growth, and creates space to think differently—together.

The Program

A Cohort-Based Solution

With support from the City of Helena and additional partners, HACF will launch a cohort-based capacity-building and collective impact program for 5–8 nonprofits serving unhoused populations in the greater Helena area.

Key program elements include:

- Capacity & Readiness Assessments – HACF will conduct individualized organizational assessments with 10 or more nonprofits to identify strengths, gaps, and opportunities for growth. These assessments will guide the selection of 5–8 nonprofits for the initial cohort.
- Cohort Learning Experience – Selected organizations—represented by both staff and board members—will participate in monthly, facilitated sessions focused on systems thinking, collaborative planning, storytelling, financial analysis, and case building. Grounded in the "wicked problems" framework, these sessions will help participants honor their individual missions while finding alignment in how they serve the community together.
- Capacity-Building Tools – Cohort members will receive support in developing fundraising strategies, organizational messaging, and customized case-for-support documents. These tools will strengthen donor relationships and prepare organizations to pursue larger grants and contracts.
- Participation Incentives – Each participating organization will receive a $2,000–$2,500 grant to support staff time, training participation, and implementation of learned strategies. Grants may be adjusted based on organizational need and capacity.
- Opportunity for Larger Impact – The cohort will work toward a shared vision and submit a collaborative proposal for implementation funding. $50,000 of the City's allocation will be reserved for this collaborative direct-service project, focused on emergency shelter solutions. HACF will seek matching contributions to grow this pool to $75,000 or more.

Proposed Timeline

- Sept–Dec 2025: Finalize program design, conduct assessments with 10+ nonprofits
- Jan 2026: Invite selected cohort participants and begin scheduling sessions
- Feb 2026: Kickoff retreat and vision-setting
- Mar–Sept 2026: Monthly cohort sessions and capacity-building workshops
- Oct–Dec 2026: Collaborative planning and development of funding proposal
- Nov 2026: Finalize and share case-for-support documents
- Dec 2026: Submit collaborative proposal and complete program evaluation

Anticipated Outcomes

- Reduced isolation and dismantling of silos among housing nonprofits
- Increased organizational capacity and fundraising readiness

- Stronger relationships and shared language among service providers
- Creation of customized case-for-support and grant preparation tools
- Submission of a collaborative proposal that addresses emergency shelter solutions
- A scalable model for systems-level nonprofit collaboration applicable to other sectors

Budget Request

- Initial readiness and capacity interview process, $10,000
- Cohort Educational Sessions: $20,000
- Nonprofit Participation Incentives: $20,000
- Collaborative Solution Funding Pool: $50,000
- Total Requested from City of Helena: $100,000

Additional support will be sought to expand the collaborative funding pool to at least $75,000 and to offset HACF's costs in administering and facilitating the cohort.

Potential Challenges to Achieving Outcomes

The current landscape in Helena is in transition among those who provide or wish to provide sheltering services. Unless/until HACF begins working directly with nonprofits to determine their capacity and readiness, we will not be able to guarantee that we can build the cohort we need to successfully meet our goals. Potential challenges to building the cohort include: new or interim leadership at organizations like Good Samaritan, God's Love's status as a private organization, Family Promise taking on new responsibilities, and others. While these challenges might make it difficult time to build a cohort, if we are successful, it may turn out to be a benefit, as times of transition could be an excellent time to set community-minded goals and work .

Therefore, we suggest this program proceed in three parts, with the following budgetary recommendations, that ensure we are reasonably confident we will be able to achieve our deliverables at each stage.

1. Assessment and Cohort Building ($10,000)
2. Capacity Building Education and Incentive Delivery
    a. Education and skill building costs ($20,000)
    b. Nonprofit participation incentives ($20,000)
3. Collaborative Proposal and Direct Service Initiation ($50,000)

HACF would report to the City of Helena representatives about the outcomes at each stage prior to moving on to the next stage, allowing both parties an opportunity to review and adjust goals based on activity to date.

Why HACF?

The Helena Area Community Foundation is a neutral, trusted convener with a long history of supporting cross-sector collaboration. As an infrastructure-builder—not a direct service provider—we are uniquely positioned to facilitate this initiative with transparency, equity, and strategic insight. HACF will coordinate all assessments, trainings, and materials

development, ensuring nonprofits have the tools, knowledge, and relationships necessary to propose and approach implementation of services.

Conclusion

This proposal is not about solving homelessness overnight—it is about investing in the nonprofit infrastructure that makes long-term solutions possible. By equipping housing nonprofits with the tools, relationships, and collaborative mindset needed to address complex challenges, we can unlock more effective and innovative approaches to supporting our unhoused neighbors in Helena.

Contact Information

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Attachment B – Unhoused Helena: Nonprofit Capacity Assessment Summary, January 2026

Unhoused Helena: Non-Profit Capacity Assessment Summary

Purpose

In December, 2025 the Helena Area Community Foundation sent out a 22 questions electronic assessment to Helena-area housing partners. The purpose of the assessment was to:

- Gain a clearer understanding of gaps, pressures, and opportunities within Helena's current service landscape, and
- Build a cohort of approximately five nonprofit organizations that want to strengthen their internal capacity, deepen collaboration, and work toward a more coordinated community response.

Respondents

Of the 21 organizations that received the assessment, 12 resonded including: Our Place - Friendship Center of Helena (TFC) - YWCA Helena - The Rocky Mountain Development Council (RMDC) - Helena Indian Alliance- United Way of the Lewis and Clark Area - Florence Crittenton - Helena Housing Authority (HHA) - St. Peter's Health - Family Promise of Greater Helena - Volunteers of America - The Salvation Army

Findings

CAPACITY

- Most Helena housing-related organizations are 501c3s with 10 or fewer full time employees devoted to housing work. The exceptions are RMDC and the HHA.
- Most housing organizations utilize 25 or fewer volunteers a month. The exceptions are Family Promise and RMDC.

POPULATIONS SERVED

- Housing organizations are most likely to serve women, families and individuals with substance use disorders and mental health issues.
- Men, LGBTQ+ folks and especially unacommpanied minors are less likely to be served by housing organizations in Helena.
- 6 of the 12 respondents serve a highly defined and limited population (e.g. TFC only serves victims of domestic violence and sexual assault, the VOA only serves Veterans).

SERVICES AND SERVICE REQUIREMENTS

- The most common service provided by respondents is "case management and housing navigation" (9) followed by rental assistance (7).
- No respondents work on affordable home ownership and only one works on permanent supportive housing. Legal support for tenants is only provided by one organization.
- Only two organizations provide overnight emergency shelter and both (The Friendship Center and Family Promise) serve a narrowly defined population. God's Love did not fill out the assessment.
- All respondents except for Our Place have some service criteria or engagement requirements to access services. There are few truly low-barrier housing options in Helena.

WILLINGNESS TO ENGAGE

- 8 of the 12 respondents indicated a willingness to engage in the Capacity Cohort.



Cross Sector Collaboration

- When asked to describe their approach to cross sector collaboration, some organizations spoke mainly in terms of referrals. "We refer people to organizations that can provide services needed."
- Others described active engagement in existing cross sector workgroups and meetings like FUSE and the Continuum of Care. Respondents named 8+ cross sector housing meetings that are active or have been active in the past in our community.
- In general, organizations agree that cross sector collaboration is important and indicate their commitment to paritcipating in it, through dedicating staff and board time is challenging for some organizations.
- Respondents indicate less willingness to adust their organization's goals and programs to co-design strategies or share funding.
- When asked to assess the current cross sector work occuring in Helena, respondents indicated housing organizations do not always have a shared vision, prioirities or metrics. They also indicated that the existing cross sector meetings are sometimes not well led or facilitated.
- "From my perspective, cross-sector housing work in Helena has been most successful during periods when key partners were consistently showing up, engaged in leadership, and committed to shared problem-solving."

Fundraising

- Organizations describe a range of capacity for fundraising, with some indicating sophisticated strategies run by teams of development staff and others noting a lack of staffing capacity and expertise related to fundraising.
- Respondents were very likely to report that they maintain accurate donor records through a donor database and have a current strategic plan and annual fundraising plan that includes financial stability and fundraising goals.
- Respondents were less likely to report their staff and board have received donor training, that board members understand their fundraising role, that their organization has a stewardship plan for major donors or that they have dedicated development staff.
- Almost all respondents said they actively cultivate government grants and contracts. Respondents were less likely to indicate that they were pursuing fundraising events, fee-for-service programs, corporate partnerships or major donors.
- Organizations development staff/team are highly skilled at grant identification, grant writing and event planning and less skilled at major gift solicitation and donor cultivation and stewardship.

Gaps and Capacity Needs

BARRIERS AND CHALLENGES TO THIS WORK

- Limited low barrier emergency shelter beds, especially during cold weather disasters, and transitional housing
- "Limited supply of affordable housing at all income levels, particularly for extremely low income households, seniors and individuals with complex needs."
- Communication and coordination between agencies

TRAINING AND CAPACITY BUILDING NEEDS

- Building skills around fundraising for housing programs and long term sustainability, including donor relationships, foundation funding, telling our story and braiding funding
- Communicating across sectors and tracking the work we are doing
- Training on how systems work together to better align eligibility and strength partnerships