

MONTANA

Grantmaking in Big Sky Country increased 30% between 2014 and 2016.

Education was the top priority for funders to Montana, receiving one-third of all funding. Oklahoma-based Asbjornson Foundation gave a \$9.2 million grant to Montana State University for campus development. The second-largest piece of the funding pie went to the environment and animals, which captured 1,347 grants totaling \$33.8 million.

Top 10 Foundations Awarding Grants to Recipients in Montana, 2016*

1. Dennis & Phyllis Washington Foundation (MT)
2. The Leona M. and Harry B. Helmsley Charitable Trust (NY)
3. Asbjornson Foundation (OK)
4. The Kendeda Fund (DE)
5. Fidelity Charitable (OH)
6. M.J. Murdock Charitable Trust (WA)
7. The ALSAM Foundation (UT)
8. The William and Flora Hewlett Foundation (CA)
9. Bozeman Deaconess Foundation (MT)
10. Montana Healthcare Foundation (MT)

TOTAL GIVING
BY 1,376 FUNDERS TO
1,542 ORGANIZATIONS: **\$180.4 MILLION**

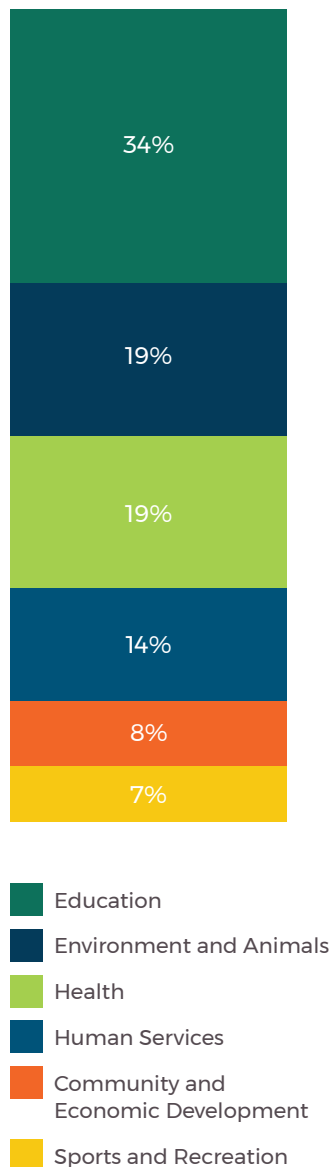
MEDIAN GRANT: **\$5,000**

NUMBER OF GRANTS: **5,449**

CHANGE IN
GIVING BETWEEN
2014 AND 2016:* **▲ +30%**

- **Annie E. Casey Foundation (MD)** awarded \$100,000 to the University of Montana in Missoula to support population studies focused on KIDS COUNT activities.
- **Bullitt Foundation (WA)** awarded \$75,000 to the Montana Environmental Information Center (MEIC) in Helena for general operating support. MEIC is a nonprofit environmental advocacy organization working to preserve and improve air and water quality across Montana.
- **Montana Community Foundation** gave \$26,209 to the Yellowstone Park Foundation to support the Cutthroat Trout Project at Yellowstone Lake.
- **The Oro y Plata Foundation** provided \$20,000 in general operating assistance to the Piegan Institute in Browning, Montana to support their Indigenous language preservation programs.

Distribution of Grants to Montana-based recipient organizations by issue focus, 2016**



**Includes individual categories for which at least 5 percent of grant dollars were allocated. Grants may occasionally be for multiple issue areas and would thereby be counted more than once.

THE DENNIS & PHYLLIS WASHINGTON FOUNDATION
Supporting graduation initiatives across Montana

Graduation Matters began in 2010 in the Missoula County Public Schools and was quickly scaled by the state's Office of Public Instruction (OPI) because of its effectiveness. The Dennis & Phyllis Washington Foundation supported Graduation Matters financially since 2012, awarding \$900,000 to the initiative during its time led by OPI, including a \$185,000 grant in 2016.

"Graduation Matters exemplified the type of collective impact work we look for in proposals," said Mike Halligan, executive director of the foundation. "The role of collective impact has been elevated tremendously over the past several years. A great idea is just that, unless there is a cadre of partners working together to ensure success. We just don't work in silos anymore."

The foundation's leadership with the Graduation Matters initiative helped to galvanize other private foundations, businesses and donors to invest more than \$1.3 million total in the initiative. These funds were primarily re-granted through OPI in the form of local grants to Graduation Matters programs in more than 50 communities.

In early 2017, in partnership with the Montana Office of the Commissioner of Higher Education (OCHE), the Montana Department of Labor and Industry and OPI, the foundation announced the creation of iGraduate Montana. The iGraduate initiative builds on the work of Graduation Matters and aims to increase graduation rates while also expanding workforce development activities. The foundation granted the OCHE \$650,000 over four years to fund iGraduate Montana. This award brings the total awards by the foundation to support critical graduation initiatives in Montana to more than \$1.5 million, and Montana's high school graduation rates continue an upward trajectory, hitting a record high of 86.4% last year.

ENDNOTE

⁹ The data in this report includes information from the data sources described in the Methodology section. Only those organizations that responded to our requests for information or had reliable information publicly available elsewhere have been included in this report.

METHODOLOGY

This report is based on the analysis of two closely-related datasets from 2014 and 2016 collected by or reported to Foundation Center, now operating as Candid, by December 31, 2018:

- Analysis of the fiscal year (FY) 2016 philanthropic giving to the Northwest relies on data from 73,813 grants totaling \$2.97 billion from a national sample of 7,445 funders that awarded at least one grant of \$1,000 or more to the six-state region — Alaska, Idaho, Montana, Oregon, Washington and Wyoming.
- Analysis of the changes in giving to the Northwest between FY's 2014 and 2016 uses a matched subset of 4,253 funders so as not to distort data due to changes in the funders in each year.

Dollar amounts may represent the full authorized grant award, or the amount paid in that year, depending on how the foundation reports its activity. Similarly, FY 2014 and FY 2016 may include grants awarded in late 2013 and late 2015, respectively, depending on a foundation's fiscal calendar. Percentages are rounded to the nearest whole number, leading to some figures reflecting slightly more than 100% totals. Dollar amounts are rounded to the tenth place.

ABOUT THE DATA

What data was collected? This report includes grants data, primarily, but also foundation-administered programs, program-related investments and mission-related investments, collectively called “transactions.”⁹ The data come from:

- IRS Forms 990 and 990-PF
- Lists provided directly by funders
- Foundation websites
- Other sources (including news and press releases or via partner organizations); learn more on Candid's website at candid.org.

New since 2016, each reported transaction is now machine-coded according to Candid's Philanthropy Classification System. The change increased the number of grants in the database and provides a more comprehensive picture of the philanthropic sector.

Candid manually reviews machine-assigned codes for transactions of \$250,000 or more made by 1,000 of the largest U.S. foundations, as well as for some special projects. The automated system uses a deliberately conservative methodology to track grant recipients that primarily work with people of color by population group, focusing on:

1. Identifying the population served by the transaction.
2. If there is no beneficiary population associated with the transaction, then Candid identifies the population served by the recipient organization.

Some transactions benefit multiple population groups, such as African Americans and LatinX Americans. In these cases, the full dollar amount is allocated for each beneficiary population, since it's not possible to specify the share of support that is intended for each population group.

For detailed information about Candid's Philanthropy Classification System or to learn more about how the data were classified visit the website at taxonomy.candid.org.

ACKNOWLEDGEMENTS

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