

**Benefis Healthcare Foundation, Inc.**

1101 26th St., S.

P.O. Box 7008

Great Falls, MT 59406-7008

Contact: John H. Goodnow, Exec. Dir.

E-mail: [foundation@benefis.org](mailto:foundation@benefis.org)URL: [www.benefisfoundation.org](http://www.benefisfoundation.org)**Type of Grantmaker:** Public charity**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public

Health conversion foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$21,120,652; Total giving: \$744,449**EIN:** 810480587**990:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2004](#) [2003](#) [2002](#)**Last Updated:** 7/6/2013**Additional Contact Information**

Toll-free tel.: (800) 544-7798

**Online Communications**[Facebook](#)[Wiki](#)[YouTube](#)**Background**

Established in 1998 in MT; converted from the merger of Montana Deaconess Medical Center and Columbus Hospital, which created Benefis Healthcare.

**Limitations**

Giving limited to north-central MT.

**Purpose and Activities**

The foundation supports and advances healthcare in north central Montana by awarding grants to charitable organizations for healthcare projects in the local area, as well as providing financial assistance to families with children suffering from serious illnesses.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Darlene Glantz Skees Memorial Nursing Scholarship**

Scholarships of up to \$2,500 are available to individuals actively delivering patient care the opportunity to obtain an associate's degree or B.S. in nursing. Applicants must be a current full-time, part-time, or registry employee of Benefis Healthcare, have a minimum of two years' experience in the field of healthcare, have been an employee of Benefis Healthcare for at least one year, maintain a 2.75 GPA, and take a minimum of nine credits per semester.

**Healthcare Scholarship Program**

Scholarships are available for current Benefis Healthcare employees and college students with the desire to obtain or advance in healthcare education or certification. Up to \$2,500 per semester is available. Applicants must have been accepted into an accredited nursing program or other approved allied healthcare program and be pursuing a degree or certification in a specific skill set, be in good academic standing (with a GPA of 2.75 or higher), take a minimum of nine credits per semester, and be eligible for employment at Benefis Healthcare (and sign a Work Commitment Agreement)

**Jane M. Buckman Husted Nursing Scholarship**

This scholarship provides up to \$1,000 for books and tuition to an A.D.N. or R.N. student who is pursuing a B.S.N. The

scholarship carries a work commitment to Benefis Healthcare upon graduation.

**Margaret Wynn Memorial Nursing Scholarship**

Scholarships of up to \$2,500 are available to licensed Practical Nurses, Certified Nursing Assistants, or Emergency Medical Technicians who wish to further their education in the nursing or health care field. Applicants must be a current member of Benefis Healthcare or one of its subsidiaries, must maintain a 3.0 GPA, and must take a minimum of nine credits per semester. Scholarship funding is renewable.

**Mercy Flight Memorial Scholarships**

These scholarships provide assistance for books and tuition to deserving students attending an accredited school in Montana. The Darcy Dengel Nursing Scholarship is available to B.S.N. or master's degree students, while the Paul Erickson Paramedic Scholarship is available to students assisting a paramedic program.

**Smith and Van Orsdel Nursing Scholarship**

Scholarships are available to Montana State University, Bozeman (MSU) nursing students enrolled in the MSU degree program at Great Falls Extended Campus. Applicants must: have attained junior or higher status and be actively seeking either a bachelor of science or a master of science degree; have an accumulated GPA of 2.75 or higher; and demonstrate leadership abilities, sound clinical performance, and service to the community, the college of nursing, and/or the healthcare profession. Scholarship funding is renewable.

**Terry L. Jackson, M.D. Memorial Scholarship**

This scholarship provides support to students interested in becoming a physical therapy assistant. Eligible applicants must be students at Montana State University College of Technology, Great Falls who are enrolled in its Physical Therapy Assistant program.

**Fields of Interest****Subjects**

Health care

**Geographic Focus**

Montana

**Types of Support**

Scholarships--to individuals

**Publications**

Annual report

Financial statement

Newsletter

**Application Information**

Application form required. Initial approach: Download application form

Board meeting date(s): Monthly

Deadline(s): May 15 and Oct. 1 for Healthcare Scholarship Programs and Smith and Van Orsdel Nursing Scholarships; July 15 and Dec. 31 for Memorial Scholarships

**Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Richard F. Doughten,\*** Chairperson

**Norbert E. Johnson,\*** Vice-Chairperson

**Bryce C. Graft, C.P.A.,\*** Secretary

**Doug M. Nicholson, C.P.A.,\*** Treasurer

**Barbara L. Byrne**

**Nora C. Gerrity, M.D.**

**Shannon E. Hoiland**

**Eugene B. Thayer**

Affiliation(s):

*Montana Milling, Inc., Member*

**Patricia T. Sletten**

**Staff**

**Number of Staff**

4 full-time professional

1 part-time professional

2 full-time support

1 part-time support

**Financial Data**

**Year ended 12/31/11:**

Revenue: \$1,839,231

Assets: \$21,120,652 (market value)

Gifts received: \$1,191,749

Expenditures: \$1,013,898

Total giving: \$744,449

Program services expenses: \$744,449

Giving activities include:

\$570,999 for 3 grants (high: \$539,628; low: \$6,500)

\$173,450 for grants to individuals

**Additional Location Information**

County: Cascade

Metropolitan area: Great Falls, MT

Congressional district: Montana District At-large

**Betts Family Foundation**

P.O. Box 251

Helena, MT 59624

Telephone: (406) 443-4422

Contact: John T. Betts, Tr.; Dawn R. Betts, Tr.

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/12): Assets: \$299,714; Total giving: \$15,000

**EIN:** 460494552

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#)

**Last Updated:** 8/19/2013

**Donor(s)**

John T. Betts

Dawn R. Betts

**Background**

Established in 2004 in MT.

**Limitations**

Giving primarily in MT.

**Fields of Interest****Subjects**

Education

Health care

Human services

**Geographic Focus**

Montana

**Application Information**

Application form required. Initial approach: Letter

Deadline(s): None

**Trustees**

**Dawn R. Betts**

**John T. Betts**

**Financial Data****Year ended 12/31/12:**

Assets: \$299,714 (market value)

Gifts received: \$1,300

Expenditures: \$19,607

Total giving: \$15,000

Qualifying distributions: \$15,000

Giving activities include:

\$15,000 for 7 grants (high: \$5,000; low: \$1,000)

**Additional Location Information**

County: Lewis and Clark

Congressional district: Montana District At-large

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**Billings Clinic Foundation**

(formerly Deaconess Billings Clinic Foundation)

2917 10th Ave. N

P.O. Box 31031

Billings, MT 59101-0721

Telephone: (406) 657-4670

Contact: Jim Duncan, Pres.

E-mail: [foundation@billingsclinic.org](mailto:foundation@billingsclinic.org)

URL: [www.billingsclinic.com/body.cfm?id=26](http://www.billingsclinic.com/body.cfm?id=26)

**Type of Grantmaker:** Public charity

**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public

**Financial Data** (yr. ended 6/30/11): Assets: \$33,364,809; Total giving: \$3,410,346

**EIN:** 810407289

**990:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 9/23/2012

**Additional Contact Information**

Toll Free Tel. : (800)-332-7156

**Background**

Established in 1982 in MT.

**Limitations**

Giving primarily in eastern MT and northern WY.

**Purpose and Activities**

The organization supports health care, education, and research at Billings Clinic.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Health Care Scholarship**

One scholarship, ranging from \$500 to \$2,000, will be awarded to a resident of Montana or Wyoming who is enrolled in a course of study at an accredited technical school, college, or university in Montana or Wyoming.

**Work Commitment Scholarships**

This award varies from \$3,000 to \$5,000 per year and is given to a recipient who agrees to 12 to 18 months of employment at Billings Clinic (depending on scholarship amount and if offered a position upon graduation) for each year the scholarship is received. Scholarships are renewable for two years.

**Fields of Interest**

**Subjects**

Health care

Medical school/education

**Geographic Focus**

Montana

Wyoming

**Types of Support**

Research

Scholarships--to individuals

**Publications**

Financial statement

Informational brochure

Newsletter

**Application Information**

Application form required. Initial approach: Online application

Copies of proposal: 2

Deadline(s): Varies

**Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Aaron Sparboe,\*** Chairperson

Affiliation(s):

*Lamplighter Square, Manager*

**James R. Bennett,\*** Vice-Chairperson

Affiliation(s):

*Treco Constructors, Inc., President*

**Jim Duncan,\*** President

**Dorothy Metz,** Secretary

**Gary Everson,\*** Treasurer

Affiliation(s):

*Hendrickson Law Firm, PC, Attorney*

**Keith Cook**

Affiliation(s):

*First Interstate Bank, Religious President*

**Patricia Coon, M.D.**

Affiliation(s):

*Billings Clinic, Geriatrics*

**Jim Gainan**

Affiliation(s):

*Gainans, Business Owner*

**Mitch Goplen**

### **Staff**

#### **Number of Staff**

3 full-time professional

2 part-time professional

1 full-time support

1 part-time support

### **Memberships**

#### **Associations and Other Philanthropic Organizations**

Montana Nonprofit Association

### **Financial Data**

#### **Year ended 6/30/11:**

Revenue: \$4,825,105

Assets: \$33,364,809 (market value)

Gifts received: \$3,018,787

Expenditures: \$3,755,220

Total giving: \$3,410,346

Giving activities include:

\$3,410,346 for grants

### **Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

**Marshall and Mary Brondum Special Assistance Foundation, Inc.**

P.O. Box 3106

Missoula, MT 59806-3106

Telephone: (406) 549-4148

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 3/31/12): Assets: \$3,528,957; Total giving: \$96,470

**EIN:** 363700887

**990-PF:** [2013](#) [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 4/23/2013

**Donor(s)**

Marshall Brondum

**Background**

Established in 1990 in MT.

**Limitations**

Giving primarily in MT.

**Purpose and Activities**

Giving primarily for special assistance to individuals in need; support also for health care, human services, and youth services.

**Fields of Interest**

**Subjects**

Arts, folk arts

Boys & girls clubs

Education

Health care

Hospitals (general)

Human services

Human services, gift distribution

Youth, services

**Geographic Focus**

Montana

**Types of Support**

General/operating support

Grants to individuals

**Application Information**

Application form required. Initial approach: Proposal

Board meeting date(s): Jan., Apr., July, and Oct.

Deadline(s): 45 days in advance of quarterly board meetings

**Officers**

**Ken Caruso**, President  
**Sabrina White**, Treasurer

**Trustees**

**James E. Congdon**  
**Kathy Flynn**  
**Anna Martello**

**Financial Data**

**Year ended 3/31/12:**

Assets: \$3,528,957 (market value)  
 Gifts received: \$465  
 Expenditures: \$133,887  
 Total giving: \$96,470  
 Qualifying distributions: \$96,470  
 Giving activities include:  
 \$7,500 for 5 grants (high: \$3,000)  
 \$88,970 for 29 grants to individuals (high: \$23,513)

**Additional Location Information**

County: Missoula  
 Metropolitan area: Missoula, MT  
 Congressional district: Montana District At-large

**District 7 Human Resources Development Council**

7 N. 31st St.  
 Billings, MT 59101-2114  
 Telephone: (406) 247-4732  
 Fax: (406) 248-2943  
 E-mail: [info@hrdc7.org](mailto:info@hrdc7.org)  
 URL: [www.hrdc7.org](http://www.hrdc7.org)

**Type of Grantmaker:** Public charity

**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public

**Financial Data** (yr. ended 6/30/11): Assets: \$3,236,545; Total giving: \$4,157,709

**EIN:** 810300207

**990:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 9/23/2012

**Additional Contact Information**

Additional address: 501 North Center Ave., Hardin, MT 59034, tel.: (406) 665-3500, fax: (406) 665-1395

**Background**

Established in 1966 in MT.

**Limitations**

Giving limited to Big Horn, Carbon, Stillwater, Sweet Grass, and Yellowstone counties, MT.

**Purpose and Activities**

The organization seeks to empower people in need through mobilizing and developing community resources by creating



opportunities for success in Big Horn, Carbon, Stillwater, Sweet Grass, and Yellowstone counties.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Scholarship Program**

Scholarships to students of Big Horn, Carbon, Stillwater, Sweet Grass, or Yellowstone County, MT to help pay for postsecondary education. Scholarships vary from \$500 to \$2,000 and covers tuition, books, and required supplies at an eligible educational institution. Applicants must be 18 years or older, have a source of earned income (not currently receiving TANF, SSI/SSDI), have a minor child currently living at home, have household gross income not exceeding 185 percent of the Federal Poverty Level, be in good academic standing and currently enrolled in postsecondary education or a training program.

**Fields of Interest****Subjects**

Mental health/crisis services  
YM/YWCAs & YM/YWHAs

**Geographic Focus**

Montana

**Application Information**

Board meeting date(s): 3rd Tues. of every other month

**Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Jon Brown,\*** Chairperson

**Leon Pattyn,\*** Vice-Chairperson

**Carl Visser,\*** Chief Executive Officer

**Mark Vinger,\*** Secretary and Treasurer

**David Davidson**

**John Doyle**

**Tom Frisby**

**Philip Hathaway**

**Vera Jane He**

**Tammy Hoth**

**Fay Marsh**

**Jodi Montoya**

**Dennis Shupak**

**James Thompson**

**Financial Data****Year ended 6/30/11:**

Revenue: \$9,427,851

Assets: \$3,236,545 (market value)

Gifts received: \$9,190,168

Expenditures: \$9,607,658

Total giving: \$4,157,709

Giving activities include:

\$25,638 for grants

\$4,132,071 for grants to individuals

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

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**Double F. Foundation**

P.O. Box 3

Ennis, MT 59729-0003

Contact: Jon S. Fossel, Pres.

**Type of Grantmaker:** Operating foundation

**Financial Data** (yr. ended 9/30/12): Assets: \$117,343; Total giving: \$272,500

**EIN:** 202751477

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#)

**Last Updated:** 8/29/2013

**Donor(s)**

Jon S. Fossell

Jack Creek Reserve Foundation

**Background**

Established in MT.

**Limitations**

Giving primarily in MT.

**Fields of Interest**

**Subjects**

Animals/wildlife

Education

Environment

Health care

Hospitals (general)

**Geographic Focus**

Montana

**Application Information**

Application form required. Initial approach: Request application form

Deadline(s): None

**Officers**

**Jon S. Fossel**, President

**Dorothy M. Fossel**, Treasurer

**Alde Feskanin**, Executive Director

**Directors**

**Becky V. Fossel**

**Steven L. Fossel**

**Financial Data****Year ended 9/30/12:**

Assets: \$117,343 (market value)

Expenditures: \$279,324

Total giving: \$272,500

Qualifying distributions: \$279,324

Giving activities include:

\$272,500 for 7 grants (high: \$150,000; low: \$250)

**Additional Location Information**

County: Madison

Congressional district: Montana District At-large

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**Ila B. Dousman Fund Inc.**

321 Fairway Dr.

Whitefish, MT 59937-3230

Telephone: (406) 862-4487

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$196,086; Total giving: \$147,924

**EIN:** 810417522

**990-PF:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 6/3/2013

**Background**

Established in 1986 in MT.

**Limitations**

Giving primarily in MT.

No support for political purposes.

No grants to individuals.

**Fields of Interest****Subjects**

Big Brothers/Big Sisters

Children/youth, services

Education

Higher education, university

Human services

Reproductive health, family planning

**Geographic Focus**

Montana

**Application Information**

Application form required. Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Detailed description of project and amount of funding requested

Initial approach: Proposal

Deadline(s): None

### **Officer and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Carole I. Erickson,\*** Secretary-Treasurer

**Leif B. Erickson**

**Kristin Tabor**

### **Financial Data**

#### **Year ended 12/31/11:**

Assets: \$196,086 (market value)

Expenditures: \$230,826

Total giving: \$147,924

Qualifying distributions: \$154,611

Giving activities include:

\$147,924 for 36 grants (high: \$25,000; low: \$500)

### **Additional Location Information**

County: Flathead

Congressional district: Montana District At-large

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### **O. P. and W. E. Edwards Foundation, Inc.**

c/o Jo Ann Eder

P.O. Box 2445

Red Lodge, MT 59068-2445

Telephone: (406) 446-1077

Contact: Jo Anne Eder, Pres.; Amy Moore, Foundation Mgr.

Fax: (406) 446-1363

E-mail: [info@opweedwards.org](mailto:info@opweedwards.org)

URL: [opweedwards.org](http://opweedwards.org)

#### **Type of Grantmaker**

Independent foundation

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 8/31/12): Assets: \$34,719,590; Total giving: \$3,169,168

**EIN:** 136100965

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**E-Grant Reporter**

**Last Updated:** 5/30/2013

### **Additional Contact Information**

E-mail address of Amy Moore, Foundation Mgr., for specific grant questions: [amoore@opweedwards.org](mailto:amoore@opweedwards.org)

### **Online Communications**

[Grants List](#)

### **Donor(s)**

*Note: If a donor is deceased, the symbol (‡) follows the name.*

William E. Edwards‡

J.N. Edwards‡

Harriet E. Gamper  
David E. Gamper†  
Jo Ann Eder

### **Economic Crisis Information**

New policies implemented for the economic crisis include: 1) Revert to more sustainable granting levels (similar to grantmaking levels between 2004 and 2006); 2) For each organization, the foundation will not approve more than one grant per year for the same project/purpose; 3) Because of the foundation's emphasis on site visits, the foundation has a geographical focus where it awards grants. With some exceptions, this area includes MT, NY, and VT, and organizations working in Indian country; The foundation will not generally award grants over 20 percent of an organization's operating revenue excluding in-kind contributions; 5) Grants made to organizations that are new to the foundation will be smaller and include more reporting until a better relationship is established. The foundation is also making Early Childhood Care and Education a priority in its grantmaking. To this end, the foundation makes grants to non-profit organizations for general, program or scholarship support of their work with low-income, at-risk, underserved youth and children. The foundation may provide limited support for quality improvement, capacity building and advocacy for these organizations either directly or through intermediaries. The foundation's focus remains on non-profit child care centers, pre-schools and out of school organizations with limited support for school-centered programs, non-profit schools and young adult transitional programs. The foundation has special interest in helping Native American children, youth and their families, especially those in the Dakotas, ID, MT and WY.

### **Background**

Incorporated in 1962 in NY.

### **Limitations**

Giving primarily in MT, NY, and VT; limited funding in, ND, Minneapolis, MN, OR, SD, and the Northwest. No grants to individuals, or for capital grants.

### **Purpose and Activities**

Major interest in programs helping economically disadvantaged young people become able to survive and thrive on their own, with preference to smaller, comprehensive programs that are integral parts of their communities' networks of services.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Arts Fund**

Support for programs that seek to inspire creative expression in people of all ages, abilities, and income through their connections and exchanges with artists and their artistic activities. This is an un-endowed, pass-through discretionary fund. Grants from this fund are suggested by the trustee.

#### **Environmental Fund**

Support for programs that seek to protect, promote and foster a love for the environment, especially through education. This is an un-endowed, pass-through discretionary fund. Grants from this fund are suggested by the trustee.

#### **General Fund**

This fund supports organizations that help provide a bridge to a life of greater opportunity to low-income, at-risk, underserved youth and children. The foundation believes that these children deserve assistance that is holistic and long lasting. This assistance should address significant factors that impede success in education and in life.

#### **Sky and Earth Fund**

The focus is on programs that support, promote and foster a love for science, especially astronomy, as well as programs that work to ensure affordable housing for generations to come. This is an un-endowed, pass-through discretionary fund. Grants from this fund are suggested by the trustee.

### **Fields of Interest**

**Subjects**

Astronomy  
Children/youth, services  
Community/economic development  
Education  
Family services  
Human services  
Performing arts  
Visual arts  
Youth development

**Population Groups**

Children/youth  
Economically disadvantaged  
Indigenous peoples  
Infants/toddlers  
Native Americans/American Indians  
Young adults  
Youth

**Geographic Focus**

Minnesota  
Montana  
New York  
North Dakota  
South Dakota  
Vermont

**Types of Support**

Continuing support  
Emergency funds  
General/operating support  
Management development/capacity building  
Matching/challenge support  
Program-related investments/loans  
Program development  
Scholarship funds  
Seed money

**Publications**

Application guidelines  
Grants list  
IRS Form 990 or 990-PF printed copy available upon request

**Application Information**

Unsolicited full proposals not considered. The foundation requests proposals from organizations about which the trustees are personally and directly knowledgeable. See foundation web site for details. Application form required. Initial approach: See foundation web site for instructions and guidelines  
Board meeting date(s): As required

**Officers and Trustees**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Jo Ann Eder,\*** President  
**Gisela Gamper,\*** Vice President  
**Mark D. Eder,\*** Secretary  
**Yogeeta Gamper,\*** Treasurer  
**Jessica Dunbar**  
**Christopher E. Gamper**  
**Harriet E. Gamper**

### **Staff**

#### **Number of Staff**

1 part-time support

### **Memberships**

#### **Regional Associations of Grantmakers**

Philanthropy Northwest

#### **Affinity Groups**

Association of Small Foundations

Grantmakers for Children, Youth and Families

Mission Investors Exchange

Native Americans in Philanthropy

#### **Associations and Other Philanthropic Organizations**

Council on Foundations

Montana Nonprofit Association

### **Financial Data**

#### **Year ended 8/31/12:**

Assets: \$34,719,590 (market value)

Gifts received: \$850,000

Expenditures: \$4,649,119

Total giving: \$3,169,168

Qualifying distributions: \$3,207,721

Giving activities include:

\$3,169,168 for 127 grants (high: \$118,000; low: \$1,000)

#### **Estimated financial data for year ending 8/31/13:**

Assets: \$34,000,000

Grants: \$2,000,000

### **Additional Location Information**

County: Carbon

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

### **Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

\$177,000 to United Methodist Church of Leipsic, Leipsic, OH, in 2012. For grant of which \$118,000 - 10% thereof to be paid to the Defiance District Office of the United Methodist Church to be used toward college scholarships for pre-ministerial students, 5% thereof to the Caring and Sharing Group, and the balance to be distributed in such Christian Mission projects as the Outreach Committee, and \$59,000 for Church's Christian Education and Music Programs, payable over 1 year.

\$150,000 to Hopa Mountain, Bozeman, MT, in 2012. For Strengthening the Circle, payable over 1 year.

\$140,000 to Vermont Community Foundation, Middlebury, VT, in 2012. For Edwards Foundation Preschool Scholarships, payable over 1 year.

\$118,000 to Life Enriching Communities Foundation, Loveland, OH, in 2012. For Benevolent Care Fund for health care residents requiring financial assistance, payable over 1 year.

\$118,000 to Wesley Services Organization, Cincinnati, OH, in 2012. To improve the lives of so many seniors and disabled in the Cincinnati area with your wide range of programs, payable over 1 year.

\$60,000 to Center for Creative Education, Kingston, NY, in 2012. For after-school arts programs for at-risk and low-income children and youth in Kingston, NY, payable over 1 year.

\$55,000 to Boys and Girls Club of the Northern Cheyenne Nation, Lame Deer, MT, in 2012. For Directions Native American Scholarships, payable over 1 year.

\$55,000 to Boys and Girls Club of the Northern Cheyenne Nation, Lame Deer, MT, in 2012. For general support, payable over 1 year.

\$50,000 to Vermont Community Foundation, Middlebury, VT, in 2012. For Vermont Community Foundation Birth to Three, payable over 1 year.

\$40,000 to Southside Family Nurturing Center, Minneapolis, MN, in 2012. For general operating support, payable over 1 year.

\$35,000 to Vermont Community Foundation, Middlebury, VT, in 2012. For Vermont Community Preschool Collaborative, payable over 1 year.

\$30,000 to Farmworker Housing Development Corporation, Woodburn, OR, in 2012. For educational programs for farmworker children and youth, payable over 1 year.

\$25,000 to Big Brothers Big Sisters of Lake County and the Flathead Reservation, Ronan, MT, in 2012. For Native American Mentoring Project, payable over 1 year.

\$25,000 to Hopa Mountain, Bozeman, MT, in 2012. For program support, payable over 1 year.

\$25,000 to Hopa Mountain, Bozeman, MT, in 2012. To implement Indigenous Scholars of Promise Program, payable over 1 year.

\$25,000 to Vermont Community Loan Fund, Montpelier, VT, in 2012. For Project SUCCESS, payable over 1 year.

\$20,000 to Flagship Program, Missoula, MT, in 2012. For The Flagship Program at Lowell Elementary School, payable over 1 year.

\$20,000 to Friends of Green Chimneys, Brewster, NY, in 2012. For Green Chimneys Promise Program, payable over 1 year.

\$20,000 to Manaia, Livingston, MT, in 2012. For general support, payable over 1 year.

\$20,000 to Thrive, Inc., Bozeman, MT, in 2012. For Partnership Project Child Care Scholarships, payable over 1 year.

\$15,000 to Center for Creative Education, Kingston, NY, in 2012. For David Hykes - Harmonic Presence, payable over 1 year.

[Want to see more grants for this grantmaker? Try our Search Grants database.](#)

#### **First Interstate BancSystem Foundation, Inc.**

401 N. 31st St., Ste. 700

Billings, MT 59101-1285

Contact: Kelly Bruggeman, Exec. Dir.

Fax: (406) 255-5311

E-mail: [foundation@fib.com](mailto:foundation@fib.com)

URL: [www.firstinterstatebank.com/company/commitment/foundation](http://www.firstinterstatebank.com/company/commitment/foundation)

**Type of Grantmaker:** Company-sponsored foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$1,619,572; Total giving: \$1,195,075

**EIN:** 810465899

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#) [2001](#)

**Last Updated:** 2/3/2013

#### **Additional Contact Information**



Application address: P.O. Box 7113, Billings, MT 59103-7113

**Online Communications**

Grants Database

RSS Feed

**Donor(s)**

First Interstate Bank of Commerce

Wells Fargo Bank, N.A.

First Interstate Bank

**Economic Crisis Information**

There will be increasing focus on human services.

**Background**

Established in 1990 in MT.

**Limitations**

Giving primarily in areas of company operations in MT, western SD, and WY.

No support for lobbying or political organizations, sectarian or religious organizations not of direct benefit to the entire community, or discriminatory organizations.

No grants to individuals, or for endowments, or general operating support for established organizations.

**Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, hunger, housing, human services, community development, leadership development, and economically disadvantaged people. Support is given primarily in areas of company operations.

**Program Area(s)**

The grantmaker has identified the following area(s) of interest:

**Community Development**

The foundation supports programs designed to promote community development. Special emphasis is directed toward programs designed to promote affordable housing for low and moderate income individuals; services targeting low and moderate income individuals; activities that revitalize or stabilize low and moderate income geographies; and activities that foster economic development.

**Employee Matching Program**

The foundation matches contributions made by employees of First Interstate BancSystem to nonprofit organizations on a one-for-one basis.

**Leadership Grants**

The foundation supports programs recommended by local branch leadership to meet the needs of their prospective communities.

**Mini Banks**

The foundation, in partnership with community schools and local First Interstate branches, promotes financial literacy and asset building in students, schools, families, and communities through student-operated savings banks. All students have their own savings account and each Mini Bank account earns 4% interest.

**Neighbors Feeding Neighbors**

The foundation matches contributions made by employees and directors of First Interstate to nonprofit organizations that has established a food program during July, August, and September on a two-for-one basis.

**Volunteer Matching Program**

The foundation awards grants to nonprofit organizations with which employees of First Interstate BancSystem volunteers. The foundation awards \$8 dollars for every hour donated, with a 20 hour minimum.

**Fields of Interest**

**Subjects**

Arts  
Community/economic development  
Community development, neighborhood development  
Economic development  
Education  
Food services  
Health care  
Higher education  
Housing/shelter  
Human services  
Leadership development  
Secondary school/education

**Population Groups**

Economically disadvantaged

**Geographic Focus**

Montana  
South Dakota  
Wyoming

**Types of Support**

Building/renovation  
Capital campaigns  
Employee matching gifts  
Employee volunteer services  
Equipment  
Matching/challenge support  
Program development  
Scholarship funds

**Publications**

Application guidelines  
Grants list  
Program policy statement

**Application Information**

The First Interstate BancSystem Foundation only awards grants to organizations recommended by local First Interstate Bank branches. Applying organizations must apply to the nearest branch. Visit website for branch location address. Additional information may be requested at a later date. Application form required. Applicants should submit the following:

1. Timetable for implementation and evaluation of project
2. Results expected from proposed grant
3. Statement of problem project will address
4. Population served
5. Name, address and phone number of organization
6. Copy of IRS Determination Letter
7. Brief history of organization and description of its mission

8. Geographic area to be served
9. Copy of most recent annual report/audited financial statement/990
10. How project's results will be evaluated or measured
11. Descriptive literature about organization
12. Listing of board of directors, trustees, officers and other key people and their affiliations
13. Detailed description of project and amount of funding requested
14. Contact person
15. Copy of current year's organizational budget and/or project budget
16. Listing of additional sources and amount of support
17. Additional materials/documentation

Initial approach: Download application and mail to nearest branch location

Board meeting date(s): Quarterly

Deadline(s): None

### **Officer and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Randy Scott,\*** Chairperson and President

**Kelly Bruggeman**, Executive Director

**Ka Alberts**

**Sara Flitner**

**Ed Garding**

**Charles Heyneman**

**Susan Humble**

**Mike Huston**

**Donovan McComb**

**Shawn Rost**

**James Scott**

**Lynette Scott**

**Risa Scott**

**Thomas Scott**

**Steve Wheeler**

### **Trustee Bank**

**First Interstate Bank**

### **Staff**

#### **Number of Staff**

3 full-time professional

1 shared staff (shared with Dan & Jeanne Scott Family Foundation, James and Christine Scott Family Foundation)

#### **Key Staff**

*Note: Does not include officers.*

**Stacey Black**, Grant Admin.

**Staci Turner**, Grant Admin. & Mini Bank Coordinator

### **Memberships**

#### **Regional Associations of Grantmakers**

Philanthropy Northwest

**Associations and Other Philanthropic Organizations**

Council on Foundations

Montana Nonprofit Association

**Financial Data**

**Year ended 12/31/11:**

Assets: \$1,619,572 (market value)

Gifts received: \$719,000

Expenditures: \$1,227,103

Total giving: \$1,195,075

Qualifying distributions: \$1,195,075

Giving activities include:

\$1,195,075 for grants

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

**Gallagher Western Montana Charitable Foundation**

P.O. Box 4787

Missoula, MT 59806

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$5,575,713; Total giving: \$288,500

**EIN:** 912138399

**990-PF:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 9/18/2012

**Additional Contact Information**

Application address: c/o Carolyn Montgomery, P.O. Box 3387, Missoula, MT 59806, tel.: (406) 240-6353

**Donor(s)**

W.J. & Rosemary Gallagher Foundation

**Background**

Established in 2001 in MT.

**Limitations**

Giving limited to MT, primarily in Missoula and western MT.

**Fields of Interest**

**Subjects**

Children/youth, services

Food banks

Health care, clinics/centers

United Ways and Federated Giving Programs

YM/YWCAs & YM/YWHAs

**Geographic Focus**

Montana

**Types of Support**

General/operating support

**Application Information**

Application form required. Initial approach: Contact foundation

Deadline(s): Contact foundation

**Director**

Carolyn Montgomery

**Financial Data****Year ended 12/31/11:**

Assets: \$5,575,713 (market value)

Expenditures: \$357,549

Total giving: \$288,500

Qualifying distributions: \$332,264

Giving activities include:

\$288,500 for 30 grants (high: \$50,000; low: \$1,000)

**Additional Location Information**

County: Missoula

Metropolitan area: Missoula, MT

Congressional district: Montana District At-large

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**Hauser Lake Home**

5250 Castles Rd.

Helena, MT 59602

Telephone: (406) 227-5631

Contact: Susan L. Jackson, Pres.

**Type of Grantmaker:** Operating foundation

**Financial Data** (yr. ended 6/30/12): Assets: \$823,782; Total giving: \$31,225

**EIN:** 820564365

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)

**Last Updated:** 9/5/2013

**Donor(s)**

Frances Batenburg

**Background**

Established in 2002 in MT.

**Limitations**

Giving primarily in Helena, MT.

**Fields of Interest****Subjects**

Health care

**Geographic Focus**

Montana

**Application Information**

Application form required. Initial approach: Letter

Deadline(s): None

**Officers**

**Susan L. Jackson**, President

**Julie B. Ageson**, Vice President

**Jan Dee May**, Secretary-Treasurer

**Financial Data****Year ended 6/30/12:**

Assets: \$823,782 (market value)

Expenditures: \$6,805

Total giving: \$31,225

Qualifying distributions: \$43,559

Giving activities include:

\$31,225 for 1 grant

**Additional Location Information**

County: Lewis and Clark

Congressional district: Montana District At-large

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**Royal & Norma Johnson Charitable Foundation**

2915 Illinois St.

Billings, MT 59102-0814

Telephone: (406) 259-7531

Contact: Royal C. Johnson, Pres.

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/12): Assets: \$590,331; Total giving: \$24,875

**EIN:** 810505703

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 9/27/2013

**Donor(s)**

Royal C. Johnson Trust

Norma B. Johnson

**Background**

Established in 1995 in MT.

**Limitations**

Giving primarily in MT.

No grants to individuals.

**Fields of Interest****Subjects**

Education

Health care

Religion

**Geographic Focus**

Montana

**Types of Support**

General/operating support

**Application Information**

Application form required. Initial approach: Contact foundation for application form

Deadline(s): Contact foundation for deadline

**Officers**

**Royal C. Johnson**, President

**Clark V. Johnson**, Vice President

**Scott R. Johnson**, Secretary-Treasurer

**Financial Data**

**Year ended 12/31/12:**

Assets: \$590,331 (market value)

Gifts received: \$29,982

Expenditures: \$26,845

Total giving: \$24,875

Qualifying distributions: \$25,256

Giving activities include:

\$24,875 for 51 grants (high: \$2,000; low: \$50)

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

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**Lewis and Clark County Community Foundation**

P.O. Box 92

Helena, MT 59624

Telephone: (406) 459-8748

Contact: Judith Johnston, Foundation Admin.; For grants: Heidi Goettel, Secy.

E-mail: [admin@lccfoundation.org](mailto:admin@lccfoundation.org)

URL: [www.lccfoundation.org](http://www.lccfoundation.org)

**Type of Grantmaker:** Community foundation

**Additional Descriptor:** Geographic affiliate of a community foundation

**EIN:** 810536902

**990:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 11/5/2012

**Additional Contact Information**

Grant Application E-mail: [hgoettel@crowleyfleck.com](mailto:hgoettel@crowleyfleck.com)

**Affiliated Organizations**

Geographic Affiliate Fund of

Montana Community Foundation

**Background**

Established in 1994 in MT; a regional affiliate of the Montana Community Foundation.

**Limitations**

Giving primarily in Lewis and Clark County, MT.

**Purpose and Activities**

The foundation provides financial support to quality charitable projects benefitting Lewis and Clark County, MT and its residents.

**Fields of Interest**

**Subjects**

Arts  
Economic development  
Education  
Environment, natural resources  
Health care  
Historic preservation/historical societies  
Human services  
Youth development

**Geographic Focus**

Montana

**Publications**

Application guidelines

**Application Information**

2012 Granting Cycle Complete. Visit web site for 2013 cycle. Application form required. Applicants should submit the following:

1. Signature and title of chief executive officer
2. Name, address and phone number of organization
3. Copy of IRS Determination Letter
4. Copy of most recent annual report/audited financial statement/990
5. Listing of board of directors, trustees, officers and other key people and their affiliations
6. Detailed description of project and amount of funding requested
7. Contact person
8. Listing of additional sources and amount of support

**Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*



**Frank Cote,\*** President  
**Marcy McLean,\*** Vice President  
**Heidi Goettel,\*** Secretary  
**Lisa Bullock,** Treasurer  
**Judith M. Johnson,** Foundation Admin.  
**Steve Browning**  
**Bridgitt Erickson**  
**Aimee Grmoljez**  
**Sarah Howe-Cobb**  
**Jason B. Jewett**  
**Julie Johnson**  
**Christine Odegard**

**Memberships**

**Associations and Other Philanthropic Organizations**  
Council on Foundations

**Additional Location Information**

County: Lewis and Clark  
Congressional district: Montana District At-large

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**Missoula Community Foundation**

P.O. Box 1968  
Missoula, MT 59806  
Telephone: (406) 552-7347  
Contact: Meredith Printz, Exec. Dir.  
E-mail: [info@missoulacommunityfoundation.org](mailto:info@missoulacommunityfoundation.org)  
URL: [www.missoulacommunityfoundation.org](http://www.missoulacommunityfoundation.org)  
**Type of Grantmaker:** Community foundation  
**Additional Descriptor:** Geographic affiliate of a community foundation  
**EIN:** 810539830  
**990:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2005](#)  
**Last Updated:** 11/5/2012

**Affiliated Organizations**

Geographic Affiliate Fund of

[Montana Community Foundation](#)

**Background**

Established in 2001 in MT; a regional affiliate of the Montana Community Foundation.

**Limitations**

Giving primarily in Granite, Mineral, Ravalli and Missoula counties, MT.  
No support for sectarian or religious organizations whose principal activity is for the benefit of their own members or adherents.

No grants to individuals, or for endowment funds, loans, debt retirement, or replacement of operational deficits.

### **Purpose and Activities**

The Missoula Community Foundation is dedicated to preserving and enhancing the unique characteristics of Missoula, MT.

### **Fields of Interest**

#### **Subjects**

Arts  
Economic development  
Education  
Environment  
Health care  
Human services

### **Geographic Focus**

Montana

### **Publications**

Application guidelines

### **Application Information**

Visit foundation Web site for application form and guidelines. Application form required. Applicants should submit the following:

1. Results expected from proposed grant
2. Qualifications of key personnel
3. Name, address and phone number of organization
4. Copy of IRS Determination Letter
5. How project's results will be evaluated or measured
6. Listing of board of directors, trustees, officers and other key people and their affiliations
7. Detailed description of project and amount of funding requested
8. Contact person
9. Copy of current year's organizational budget and/or project budget

Initial approach: Submit application form and attachments

Deadline(s): June 1

Final notification: Aug. 15

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Dale Woolhiser,\*** President

**Patsy O'Keefe,\*** Vice President

**Naomi Lichtenberg,\*** Secretary

**Norm Williamson,\*** Treasurer

**Meredith Printz,** Executive Director

**Nick Jones**

**Tracy Lopez**

### **Memberships**

**Associations and Other Philanthropic Organizations**

Council on Foundations

**Additional Location Information**

County: Missoula

Metropolitan area: Missoula, MT

Congressional district: Montana District At-large

**Montana Foundation**

2739 Gregory Dr. S.

Billings, MT 59102

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/12): Assets: \$0; Total giving: \$300

**EIN:** 237140529

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 10/23/2013

**Background**

Established in MT.

**Limitations**

Giving primarily in Billings, MT.

No grants to individuals.

**Fields of Interest**

**Subjects**

Health care

**Geographic Focus**

Montana

**Officers and Trustee**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Court E. Ball**, President

**Ruth Towe**,\* Secretary-Treasurer

**Financial Data**

**Year ended 12/31/12:**

Assets: \$0 (market value)

Gifts received: \$46

Expenditures: \$329

Total giving: \$300

Qualifying distributions: \$329

Giving activities include:

\$300 for 1 grant

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

**Montana Council on Problem Gambling**

5200 9th Ave. S.

Great Falls, MT 59405-5712

Telephone: (406) 453-6006

URL: [www.mtproblemgambling.org](http://www.mtproblemgambling.org)**Type of Grantmaker:** Public charity**Additional Descriptor:** Organization that normally receives more than 33 1/3% of its support from contributions, etc.**Financial Data** (yr. ended 12/31/11): Assets: \$100,620**EIN:** 810517421**990:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) **990-PF:** [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)**Last Updated:** 10/19/2012**Additional Contact Information**

Toll-free tel.: (888) 552-9076

**Donor(s)**

Montana Gaming Industry Assn.

**Background**

Established in MT.

**Limitations**

Giving limited to MT.

**Purpose and Activities**

The council is dedicated to alleviating gambling-related social and personal distress through the provision of relevant support, referral services, and education to compulsive gamblers, their families, and other concerned Montanans.

**Fields of Interest****Subjects**

Mental health, gambling addiction

**Geographic Focus**

Montana

**Board Members****Gene Huntington****Mark T. Kennedy****Rich Miller****Neil Peterson****John Regan****Cynthia Rejchenbach****Memberships****Associations and Other Philanthropic Organizations**

Montana Nonprofit Association

**Financial Data****Year ended 12/31/11:**

Revenue: \$137,432  
Assets: \$100,620 (market value)  
Gifts received: \$133,500  
Expenditures: \$134,325

**Additional Location Information**

County: Cascade  
Metropolitan area: Great Falls, MT  
Congressional district: Montana District At-large

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**Montana Community Foundation**

1 N. Last Chance Gulch, Ste. 1  
Helena, MT 59624-1145  
Telephone: (406) 443-8313  
Fax: (406) 442-0482  
E-mail: [info@mtcf.org](mailto:info@mtcf.org)  
URL: [www.mtcf.org](http://www.mtcf.org)

**Type of Grantmaker:** Community foundation

**Financial Data** (yr. ended 6/30/12): Assets: \$59,658,108; Total giving: \$2,567,904

**EIN:** 810450150

**990:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 7/12/2013

**Additional Contact Information**

Mailing address: P.O. box 1145, Helena, MT 59624-1145

**Online Communications**

[Facebook](#)

**Affiliated Organizations**

Geographic Affiliate Funds

[Absarokee Community Foundation](#)  
[Broadwater Community Foundation](#)  
[Butte-Silver Bow Community Foundation](#)  
[Carter County Community Foundation](#)  
[Columbus Community Foundation](#)  
[Bigfork Development Company](#)  
[Elkhorn Community Foundation](#)  
[FAIR Community Foundation](#)  
[Greater Polson Community Foundation](#)  
[Greater Glendive Community Foundation](#)  
[Great Falls Area Community Foundation](#)  
[Hill County Community Foundation](#)  
[Jefferson Valley Community Foundation](#)  
[Joliet Area Community Foundation](#)  
[Lincoln County Community Foundation](#)  
[Lewis and Clark County Community Foundation](#)  
[Meagher County Community Foundation](#)

[Mineral County Community Foundation](#)  
[Missoula Community Foundation](#)  
[Musselshell Valley Community Foundation](#)  
[Nye Community Foundation](#)  
[Powder River Community Foundation](#)  
[Powell County Foundation](#)  
[Prairie Benefits](#)  
[Red Lodge Area Community Foundation](#)  
[Richland County Community Foundation](#)  
[Roberts Community Foundation](#)  
[Rocky Mountain Front Community Foundation](#)  
[Ruby Valley Foundation](#)  
[Seeley Lake Community Foundation](#)  
[Stevensville Community Foundation](#)  
[Sunburst Community Foundation](#)  
[Three Mile, Lone Rock Community Foundation](#)  
[Tobacco County Community Foundation](#)  
[Valley County Community Foundation](#)

**Background**

Incorporated in 1988 in MT.

**Limitations**

Giving limited to MT.

No support for religious purposes.

No grants for annual or capital campaigns, endowment funds, or generally for debt retirement.

**Purpose and Activities**

The foundation seeks to cultivate a culture of giving so Montana communities can flourish.

**Fields of Interest**

**Subjects**

Arts  
Economic development  
Education  
Environment, natural resources  
Human services

**Population Groups**

Adults, women  
Girls  
LGBTQ  
Minorities  
Native Americans/American Indians  
Young adults, female

**Geographic Focus**

Montana

**Types of Support**

Continuing support

Emergency funds  
Employee-related scholarships  
Scholarships--to individuals

### **Publications**

Financial statement  
Newsletter

### **Application Information**

Visit foundation web site for Application Cover Sheet and application guidelines. Application form required. Initial approach: Submit Application Cover Sheet with proposal  
Board meeting date(s): 3 times per year

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Dan Clark,\*** Chairperson  
**Brian Patrick,\*** Vice-Chairperson  
**Mary Craigle,\*** Secretary  
**Emily Kovarik,\*** Chief Financial Officer  
**Dale Woolhiser,\*** Treasurer  
**Jeff Bretherton**  
**Mike Gustafson**  
**Stacey Mueller**  
**Cynthia R. Woods**

### **Staff**

#### **Number of Staff**

5 full-time professional  
2 full-time support  
1 part-time support

#### **Key Staff**

*Note: Does not include officers.*

**Jenny Baglien,** Acct.  
**Cathy Cooney,** Program Director  
**Jen Euell,** Program Director

### **Memberships**

#### **Affinity Groups**

Women's Funding Network

#### **Associations and Other Philanthropic Organizations**

Council on Foundations  
Montana Nonprofit Association

### **Financial Data**

#### **Year ended 6/30/12:**

Assets: \$59,658,108 (market value)  
Gifts received: \$2,956,696  
Expenditures: \$4,674,299

Total giving: \$2,567,904  
Giving activities include:  
\$2,567,904 for 120 grants (high: \$112,720)

**Additional Location Information**

County: Lewis and Clark  
Congressional district: Montana District At-large

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**William and Lorene Nefsy Foundation**

P.O. Box 250  
Miles City, MT 59301  
Contact: Stan Markuson, Tr.

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 10/31/12): Assets: \$1,614,266; Total giving: \$75,975

**EIN:** 810473714

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 10/13/2013

**Background**

Established in 1991 in MT.

**Limitations**

Giving primarily in Billings, Glendive, Hysham, Miles City, Richey, Sydney, Terry, Wibaux and Worden, MT.

**Fields of Interest****Subjects**

Arts  
Health care  
Recreation

**Geographic Focus**

Montana

**Types of Support**

Building/renovation  
Capital campaigns  
Equipment  
General/operating support  
Program development  
Scholarship funds

**Application Information**

Application form required. Initial approach: Letter  
Deadline(s): 60 days prior to commencement of academic year.

**Trustees**

Caren Coffee  
William Coffee  
Stan Markuson



**Financial Data****Year ended 10/31/12:**

Assets: \$1,614,266 (market value)

Expenditures: \$84,304

Total giving: \$75,975

Qualifying distributions: \$75,975

Giving activities include:

\$75,975 for 19 grants (high: \$17,500; low: \$250)

**Additional Location Information**

County: Custer

Congressional district: Montana District At-large

**Pennmont Foundation**

409 S. 22nd Ave.

Bozeman, MT 59718-6847

Contact: Kami McGinley C.P.A.

**Type of Grantmaker:** Independent foundation**Financial Data** (yr. ended 11/30/12): Assets: \$377,902; Total giving: \$18,400

EIN: 870699934

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#)**Last Updated:** 8/27/2013**Background**

Established in 2002 in MT.

**Limitations**

Giving primarily in MT.

**Fields of Interest****Subjects**

Arts

Education

Health care

**Geographic Focus**

Montana

**Application Information**

Application form required. Initial approach: Letter

Deadline(s): Sept. 30

**Officers****Robert P. Myers**, President**Jean B. MacInnes**, Vice President**Robert C. Myers**, Secretary**Directors****Molly Myers Benedict**

**Christopher M. Myers****Financial Data****Year ended 11/30/12:**

Assets: \$377,902 (market value)

Expenditures: \$272,218

Total giving: \$18,400

Qualifying distributions: \$18,400

Giving activities include:

\$18,400 for 9 grants (high: \$3,000; low: \$1,000)

**Additional Location Information**

County: Gallatin

Congressional district: Montana District At-large

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**Rocky Mountain Technology Foundation, Inc.**

1511 Poly Dr.

Billings, MT 59102-1739

**Type of Grantmaker:** Public charity**Additional Descriptor:** Organization that normally receives a substantial part of its support from a governmental unit or from the general public**Financial Data** (yr. ended 6/30/10):

EIN: 810532886

990: [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)**Last Updated:** 11/6/2013**Limitations**

Giving limited to Billings, MT.

**Purpose and Activities**

The foundation seeks to bring together Rocky Mountain College and Billings Clinic to provide healthcare and educational opportunities to rural Montana.

**Fields of Interest****Subjects**

Health care, clinics/centers

Higher education, college

**Geographic Focus**

Montana

**Officers and Directors***Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.***Michael Mace,\*** President**Larry Campodonico,\*** Secretary**Luke Kobold****Barb Skelton****Financial Data****Year ended 6/30/10:**

Revenue: \$10,695  
Gifts received: \$10,597  
Expenditures: \$1,700

**Additional Location Information**

County: Yellowstone  
Metropolitan area: Billings, MT  
Congressional district: Montana District At-large

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**Ruby Valley Foundation**

P.O. Box 746  
Sheridan, MT 59749  
Contact: Jerry Aaker, Chair.  
E-mail: [mtaakers@3rivers.net](mailto:mtaakers@3rivers.net)  
URL: [community.mtcf.org/rubyvalley](http://community.mtcf.org/rubyvalley)  
**Type of Grantmaker:** Community foundation  
**Additional Descriptor:** Geographic affiliate of a community foundation

**Last Updated:** 10/9/2013

**Affiliated Organizations**

Geographic Affiliate Fund of  
[Montana Community Foundation](#)

**Background**

Established in 2011 in MT.

**Limitations**

Giving primarily in the Ruby Valley area, MT.

**Fields of Interest**

**Subjects**

Aging, centers/services  
Arts  
Education  
Environment  
Health care  
Nutrition  
Recreation

**Geographic Focus**

Montana

**Application Information**

Initial approach: Submit application

Deadline(s): None

**Officers and Board Members**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Jerry Aaker,\*** Chairperson

**Tony Simonsen,\*** Vice-Chairperson

**Frank Ford,\*** Treasurer

**Sandra Baril**

**Larry Best**

**Natalie Hagen**

**Additional Location Information**

County: Madison

Congressional district: Montana District At-large

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**Robert K. Snider, M.D. Memorial Fund for Medicine and Education**

2881 Silverwood St.

Billings, MT 59102-1660

Telephone: (406) 248-3833

Contact: Linda J. Snider, Pres.

**Type of Grantmaker:** Independent foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$97,802; Total giving: \$4,750

**EIN:** 810545437

**990-PF:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 3/2/2013

**Donor(s)**

Linda J. Snider

**Background**

Established in 2002 in MT.

**Limitations**

Giving primarily in MT.

**Fields of Interest****Subjects**

Arts

Health care

Youth development

**Geographic Focus**

Montana

**Application Information**

Application form required. Applicants should submit the following:

1. Additional materials/documentation

Initial approach: Proposal

Deadline(s): Jun. 1

**Officers**

**Linda J. Snider**, President

**Erika L. Jimisin**, Secretary

**Eugene W. Tierney, Jr.**, Treasurer

**Financial Data****Year ended 12/31/11:**

Assets: \$97,802 (market value)

Gifts received: \$10,037

Expenditures: \$5,545

Total giving: \$4,750

Qualifying distributions: \$5,545

Giving activities include:

\$4,750 for 3 grants (high: \$2,250; low: \$500)

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

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**The Spence Family Foundation**

100 N. 27th St., Ste. 305

Billings, MT 59101-2090

Telephone: (406) 245-9424

Contact: Ralph Spencer, Jr., Pres.

**Type of Grantmaker:** Company-sponsored foundation

**Financial Data** (yr. ended 11/30/12): Assets: \$597,066; Total giving: \$26,300

**EIN:** 043619122

**990-PF:** [2012](#) [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#)

**Last Updated:** 8/6/2013

**Donor(s)**

Ralph Spence, Jr.

Tancy W. Spence

Spence Accounts, Inc.

**Background**

Established in 2001 in MT.

**Limitations**

Giving primarily in Billings, MT.

**Purpose and Activities**

The foundation supports zoos and hospitals and organizations involved with theater, international affairs, and Christianity.

**Fields of Interest****Subjects**

Arts  
Health care  
Human services

**Geographic Focus**

Montana

**Types of Support**

General/operating support

**Application Information**

Application form required. Initial approach: Contact foundation for application information

Deadline(s): None

**Officers**

**Ralph Spence, Jr.**, President

**Tancy W. Spence**, Secretary-Treasurer

**Directors**

**Benjamin Spence**

**Nash Spence**

**Ralph Spence, III**

**Financial Data**

**Year ended 11/30/12:**

Assets: \$597,066 (market value)

Gifts received: \$72,000

Expenditures: \$28,385

Total giving: \$26,300

Qualifying distributions: \$27,460

Giving activities include:

\$25,500 for 5 grants (high: \$15,000; low: \$1,000)

\$800 for 1 grant to an individual

**Additional Location Information**

County: Yellowstone

Metropolitan area: Billings, MT

Congressional district: Montana District At-large

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**Treacy Company**

(also known as Treacy Foundation)

P.O. Box 1479

Helena, MT 59624-1479

Telephone: (406) 443-3549

Contact: Kimmy Skiftun, Exec. Dir.

Fax: (406) 443-6183

E-mail: [kimmy@treacyfoundation.org](mailto:kimmy@treacyfoundation.org)

URL: [www.treacyfoundation.org](http://www.treacyfoundation.org)

**Type of Grantmaker**

Independent foundation

**Additional Descriptor:** Family foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$35,925,701; Total giving: \$984,925

**EIN:** 810270257

**990-PF:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 12/3/2012

**Donor(s)**

Treacy Co.

James O'Connell

**Background**

Established in 1947.

**Limitations**

Giving primarily in ID, MT, and ND.

No support for political organizations, candidates and campaigns, or for private operating and non-operating foundations.

No grants to individuals (directly), or for operating expenses, salaries, travel, or meals; no loans.

**Purpose and Activities**

Giving primarily for human services and education, including scholarship awards to college freshmen or sophomores who reside in Idaho, Montana, and North Dakota.

**Fields of Interest**

**Subjects**

Health care

Higher education

Human services

Protestant agencies & churches

**Geographic Focus**

Idaho

Montana

North Dakota

**Types of Support**

Continuing support

Scholarship funds

**Publications**

Annual report

Application guidelines

**Application Information**

Applications must be typed or electronically produced. Application form required. Applicants should submit the following:

1. Results expected from proposed grant
2. Copy of IRS Determination Letter
3. Copy of most recent annual report/audited financial statement/990
4. Copy of current year's organizational budget and/or project budget
5. Listing of additional sources and amount of support

Initial approach: Use application form on foundation web site

Board meeting date(s): Between July 1 and July 15

Deadline(s): See foundation web site and application form for current deadlines

Final notification: Grants submitted for \$10,000 or less will be given a response within 30 days

### **Officers**

**Don Campbell**, Chairperson

**Kelly O'Connell**, Secretary-Treasurer

**Tom McCarvel**, Vice-Chairperson

**Kimmy Skiftun**, Executive Director

### **Trustee**

**Mike Cooney**

**Theresa Ortega**

### **Staff**

#### **Number of Staff**

1 full-time support

2 shared staff

### **Memberships**

#### **Affinity Groups**

Association of Small Foundations

#### **Associations and Other Philanthropic Organizations**

Montana Nonprofit Association

### **Financial Data**

#### **Year ended 12/31/11:**

Assets: \$35,925,701 (market value)

Expenditures: \$1,282,993

Total giving: \$984,925

Qualifying distributions: \$1,068,439

Giving activities include:

\$883,425 for 51 grants (high: \$200,000; low: \$100)

\$101,500 for grants to individuals

### **Additional Location Information**

County: Lewis and Clark

Congressional district: Montana District At-large

### **Dennis & Phyllis Washington Foundation, Inc.**

(formerly Dennis R. Washington Foundation, Inc.)

P.O. Box 16630

Missoula, MT 59808-6630

Telephone: (406) 523-1300

Contact: Mike Halligan, Exec. Dir.

URL: [www.dpwfoundation.org](http://www.dpwfoundation.org)

**Type of Grantmaker:** Company-sponsored foundation

**Financial Data** (yr. ended 12/31/11): Assets: \$436,814,858; Total giving: \$20,388,792



EIN: 363606913

**990-PF:** [2011](#) [2010](#) [2009](#) [2008](#) [2007](#) [2006](#) [2005](#) [2004](#) [2003](#) [2002](#) [2001](#)

**Last Updated:** 8/5/2013

### **Online Communications**

[Facebook](#)

[Horatio Alger Recipients](#)

[Dennis R. Washington Achievement Recipients](#)

### **Donor(s)**

Dennis & Phyllis Washington

Washington Corporations

Montana Rail Link, Inc.

Montana Resources, L.L.P

Dennis Washington

Phyllis J. Washington

Modern Machinery, Inc.

### **Background**

Established in 1988 in MT.

### **Limitations**

Giving primarily in areas of company operations, with emphasis on MT.

No support for discriminatory organizations, sectarian or religious organizations not of direct benefit to the entire community, veterans' or fraternal organizations not of direct benefit to the entire community, private or public foundations, or political action or legislative advocacy groups.

No grants to individuals (except for scholarships), or for debt reduction, general operating support, travel expenses or trips, endowments, sponsorships including auctions, dinners, tickets, advertising, or annual fundraising events, curriculum development for educational institutions, or motor vehicle or other transportation equipment purchases; generally, no grants for capital campaigns; no loans.

### **Purpose and Activities**

The foundation supports organizations involved with arts and culture, education, health, human services, and community services, and awards college scholarships and fellowships. Special emphasis is directed toward programs designed to provide a direct service to economically and socially disadvantaged youth and their families, at-risk or troubled youth, and individuals with special needs.

### **Program Area(s)**

The grantmaker has identified the following area(s) of interest:

#### **Arts and Culture**

The foundation supports programs designed to bring people together from all walks of life to share their creative talents, intellects, passions, customs, and bold initiatives to explore new ways of doing things, with emphasis on theatre, art, and music.

#### **Community Service**

The foundation supports programs designed to promote community service and organizations that fortify the connection between community service and the common interest to do more for the places we call home.

#### **Dennis and Phyllis Washington Native American Graduate Fellowship**

The foundation awards a graduate fellowship of up to \$10,000 to a member of a Montana Native American Tribe who is accepted into a Master's or Doctoral Degree program at the Graduate School of The University of Montana or Montana State University. The program is administered by the graduate school admissions office at Montana State University and The University of Montana.

**Dennis R. Washington Achievement Scholarship**

The foundation annually awards scholarships of up to \$30,000 for up to 3 years to State and National Horatio Alger Scholar Alumni who have exhibited integrity and perseverance in overcoming personal adversity and who is working towards a post-graduate degree in education.

**Education**

The foundation supports programs designed to reach children through early childhood education, after-school learning, post-secondary scholarships, and graduate fellowships that help young people get the start they deserve.

**Health and Human Services**

The foundation supports programs designed to ensure access to basic healthcare services to the most vulnerable members of the community. Special emphasis is directed toward groups that provide physical or psychological care for those in need; and experiential programs that offer disabled or disadvantaged people the chance to do something they may not have otherwise.

**Helen B. Miller Horatio Alger Scholarship**

The foundation awards college scholarships to students who attend Montana State University, demonstrate financial need, and demonstrate the ability to overcome adversity in their young lives. The program is administered by Montana State University.

**Horatio Alger Montana Undergraduate Scholarship Program**

The foundation annually awards 50 \$10,000 college scholarships to Montana high school seniors planning to attend The University of Montana, The University of Montana-Western, The University of Montana-Missoula College of Technology, Helena College of Technology of the University of Montana, or Montana Tech of the University of Montana. The scholarship was expanded to include Montana State University and its affiliate campuses.

**Washington Companies Employee Family Scholarship Program**

The foundation awards college scholarships of up to \$8,000 to children or spouses of employees who are attending an accredited university, college, vocational technical school, community college of technology, or trade school. Employees must work full-time within an eligible Washington Company.

**Fields of Interest****Subjects**

Arts  
Athletics/sports, Special Olympics  
Community/economic development  
Dental care  
Education  
Education, early childhood education  
Education, services  
Food banks  
Health care  
Higher education  
Human services  
Performing arts, music  
Performing arts, theater  
Recreation, parks/playgrounds  
Scholarships/financial aid  
Youth development

**Population Groups**

Children  
Children/youth  
Disabilities, people with  
Economically disadvantaged  
Homeless  
Infants/toddlers

Native Americans/American Indians  
Physically disabled  
Youth

### **Geographic Focus**

Montana

### **Types of Support**

Annual campaigns  
Building/renovation  
Continuing support  
Employee-related scholarships  
Fellowships  
Matching/challenge support  
Program development  
Scholarship funds  
Scholarships--to individuals

### **Publications**

Application guidelines  
Program policy statement

### **Application Information**

Organizations receiving support are asked to submit a post-grant evaluation. An interview may be required for graduate level scholarships. Application form required. Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Copy of most recent annual report/audited financial statement/990
3. Detailed description of project and amount of funding requested
4. Copy of current year's organizational budget and/or project budget

Initial approach: Complete online application form

Board meeting date(s): Quarterly

Deadline(s): None; Jan. 15 to Apr. 1 for Dennis R. Washington Achievement Scholarship; Apr. 15 for Horatio Alger Montana Undergraduate Scholarship Program (apply directly to Horatio Alger Association via their website)

Final notification: 90 days

Additional information: Requests for scholarships should include transcripts, GPA, letters of recommendation, and an essay.

### **Officers and Directors**

*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*

**Phyllis J. Washington,\*** Chairperson

**Lawrence R. Simkins,** President

Affiliation(s):

*Washington Corporations, President and Chief Executive Officer*

**Mike Halligan,** Executive Director

**William H. Brodsky**

**Rolin Erickson**

**Brian T. Sheridan**

**Staff****Number of Staff**

1 full-time professional

**Memberships****Regional Associations of Grantmakers**

Philanthropy Northwest

**Financial Data****Year ended 12/31/11:**

Assets: \$436,814,858 (market value)

Gifts received: \$78,134,276

Expenditures: \$21,653,216

Total giving: \$20,388,792

Qualifying distributions: \$20,942,995

Giving activities include:

\$20,388,792 for 291 grants (high: \$10,000,000; low: \$500)

**Estimated financial data for year ending 12/31/12:**

Assets: \$499,418,327

Grants: \$3,764,769

**Additional Location Information**

County: Missoula

Metropolitan area: Missoula, MT

Congressional district: Montana District At-large

**Selected Grants**

The following grants are a representative sample of this grantmaker's funding activity:

\$16,000,000 to Washington Family Ranch, Antelope, OR, in 2010. For program support, payable over 1 year.

\$10,000,000 to Horatio Alger Association of Distinguished Americans, Alexandria, VA, in 2011. For Dennis R.

Washington Achievement Scholarship, payable over 1 year.

\$2,095,000 to University of Montana Foundation, Missoula, MT, in 2010. For program support, payable over 1 year.

\$1,600,000 to Washington Family Ranch, Antelope, OR, in 2011. For program support, payable over 1 year.

\$1,400,000 to Washington Family Ranch, Antelope, OR, in 2011. For program support, payable over 1 year.

\$1,100,000 to Washington Family Ranch, Antelope, OR, in 2011. For program support, payable over 1 year.

\$1,000,000 to Washington Family Ranch, Antelope, OR, in 2011. For program support, payable over 1 year.

\$100,000 to Montana Tech Foundation, Butte, MT, in 2011. For Frank and Ann Gilmore University Relations Center, payable over 1 year.

\$50,000 to Missoula County High Schools, Missoula, MT, in 2010. For program support, payable over 1 year.

\$50,000 to Missoula County Public Schools, Missoula, MT, in 2011. For Graduation Matters donation, payable over 1 year.

\$37,000 to Special Olympics Montana, Great Falls, MT, in 2010. For program support, payable over 1 year.

\$31,456 to University of Montana Foundation, Missoula, MT, in 2011. For Presidential Scholarship fund, payable over 1 year.

\$25,000 to Butte Archives, Friends of the, Butte, MT, in 2010. For program support, payable over 1 year.

\$20,000 to Polson School District, Polson, MT, in 2010. For program support, payable over 1 year.

\$15,000 to Childrens Oncology Camp Foundation, Missoula, MT, in 2011, payable over 1 year.

\$15,000 to Childrens Oncology Camp Foundation, Missoula, MT, in 2010. For program support, payable over 1 year.

\$10,000 to Box Elder School District, Box Elder, MT, in 2011. For 21st century afterschool program, payable over 1 year.

\$10,000 to Maroon Athletic Center, Butte, MT, in 2010. For program support, payable over 1 year.

\$10,000 to Missoula Law Enforcement Youth Camp, Missoula, MT, in 2010. For program support, payable over 1 year.

\$5,500 to Education Foundation for Billings Public Schools, Billings, MT, in 2010. For program support, payable over 1 year.

Want to see more grants for this grantmaker? [Try our Search Grants database.](#)

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FOUNDATION  
CENTER