



# City of Helena

CITY OF HELENA  
City-County Joint Work Session  
June 3, 2025 - 4:00 PM

City - County Building Room 326 / Zoom Online Meeting; <https://zoom.helenamt.gov/c/36053471/publicmeetings>

1. **Call To Joint Work Session, Introductions**
  - A. Meeting Rules of Procedure
2. **Commission Comments, Questions**
3. **Minutes**
  - A. 4-1-25 Joint Work Session
  - B. 5-6-25 Joint Work Session
4. **Joint Discussion**
  - A. Helena Area Community Foundation FY25 Grant Report
  - B. Update on Open Lands Management, Fuels, Wildland Fire Response
  - C. Metropolitan Planning Organization (MPO) Update
5. **Future Agenda Items**
6. **Public Comment**
7. **Adjournment**

The City of Helena is committed to providing access to persons with disabilities for its meetings, in compliance with Title II of the Americans with Disabilities Act and the Montana Human Rights Act. The City will not exclude persons with disabilities from participation at its meetings or otherwise deny them the City's services, programs, or activities.

Persons with disabilities requiring accommodations to participate in the City's meetings, services, programs, or activities should contact the City's ADA Coordinator, Ellie Ray, as soon as possible to allow sufficient time to arrange for the requested accommodation, at any of the following:

Phone: (406) 447- 8490

TTY Relay Service 1-800-253-4091 or 711

Email: [citycommunitydevelopment@helenamt.gov](mailto:citycommunitydevelopment@helenamt.gov)

Mailing Address & Physical Location: 316 North Park Avenue, Room 445, Helena, MT 59623.

## **Rules of Procedure:**

Good evening and welcome to the City of Helena City Commission Meeting. We appreciate your attendance and participation. To ensure our meetings are productive and respectful, we ask everyone to adhere to the following guidelines:

### **Decorum and Expectations:**

- Please maintain respect towards the Commission, presenters, and other participants. All participants are expected to avoid using profanity or hostile language. Inappropriate behavior or continued disruptions may result in action by the Commission.

### **Zoom Participation Decorum:**

- Please keep your microphone muted unless you are speaking to minimize background noise.
- Use the “Raise Hand” feature if you wish to speak and wait to be recognized by the chair.
- If available to you, please ensure your video is on if you are speaking, to maintain transparency and engagement.
- Participants joining by telephone may raise their hand by pressing \*9 and mute/unmute themselves using \*6.

### **Public Comment:**

- Public comments will be recognized only during designated periods by the presiding officer.
- State your name for the record when recognized to speak.
- **Each speaker will be given two minutes to make their comments. At two minutes, you will be asked to begin wrapping up. Please keep comments respectful, concise, and non-repetitive.**
- Individuals may speak once per agenda item and during the general comment period at the end of the meeting.
- **Comments will first be taken from people present in the room, followed by online participants.**
- Online participants may also use the Q&A feature to submit written comments.
- **If you ask a question during public comment, it will be recorded but you likely will not receive an answer. The purpose of public comment is for you to share your thoughts on a topic, not ask questions to City staff.**
- Members of the Commission may ask clarifying questions during the comment period.
- **All comments will be recorded in the permanent record. Formal statements can be submitted via the General Public Comment form on the City’s website. Comments on public engagement pages and media are public records under MCA 2-6-1003.**

### **Montana’s Right to Participate and Right to Know Laws:**

- In accordance with Montana’s right to participate law (MCA 2-3-103), the public is encouraged to engage in the decision-making process.
- The right to know law (MCA Article II Section 10) ensures that all meetings are open to the public and that records are accessible. We strive to maintain transparency and accountability in all our proceedings.

### **Public Meetings and Recordings:**

- **Please be aware that all public meetings and recordings are considered public records. These records are accessible to the public at any time.**
- **By participating in this meeting, you acknowledge that your comments and participation will be part of the public record.**

Thank you for your cooperation and for contributing to a respectful and effective meeting.



**City of Helena/Lewis & Clark County  
Joint Work Session Meeting  
April 1, 2025 – 4:00 PM  
City-County Building, 316 N. Park Ave., Room 326  
Zoom Hub Link; <https://lccountymt.zoom.us/j/ze/helenamt>**

**Time & Place**

A City Commission Administrative meeting was held on Tuesday, April 1, 2025 at 4:00 p.m. in room 326 of the City-County Building and via Zoom Hub Link: <https://lccountymt.zoom.us/j/ze/helenamt>.

**Call to Work Session, Introductions**

**(00:00:19)** The following responded present:

**In Person**

City Manager Burton  
City Commissioner Logan  
City Commissioner Shirtliff  
Mayor Collins  
County Chief Administrative Officer Baltz  
County Commissioner Hunthausen  
County Commissioner Payne  
County Commissioner Rolfe

**Via Zoom**

None

The following were absent:

City Commissioner Dean  
City Commissioner Reed

**Minutes**

A. 3-4-25 Joint Work Session Minutes

**(00:01:40) There being no comments or questions from the Commission, Mayor Collins accepted Minutes A.**

**Joint Discussion**

**A. City-County Joint Infrastructure Study Update**



- (00:01:55)** County Land Use Planner Morgan and City Public Works Director Leland presented Item A.
- (00:10:57)** Commissioner Hunthausen asked Planner Morgan about next steps in the process.
- (00:13:35)** Commissioner Shirtliff asked Planner Morgan about dates for public meetings and hearings.
- (00:14:20)** Commissioner Shirtliff asked Director Leland about a timeline for production wells.

#### **B. Lewis and Clark Metro Area Opioid Abatement Governance Committee Update**

- (00:16:00)** City Grants Administrator Opitz presented Item B.
- (00:18:39)** Commissioner Rolfe discussed the current membership of the Committee and overall function.

#### **Future Agenda Items**

- (00:21:14)** Manager Burton discussed adding a topic to the next agenda about a project.
- (00:21:35)** Administrative Officer Baltz discussed the May joint budget items.

#### **Public Comment**

- (00:22:00)** There were no further comments or questions from the Commissions and/or public.

#### **Upcoming Events, Joint Announcements**

#### **Adjournment**

- (00:22:30)** There being no further business before the Commission, the meeting adjourned at 4:22pm.



**City of Helena/Lewis & Clark County  
Joint Work Session Meeting  
May 6, 2025 – 3:00 PM  
City-County Building, 316 N. Park Ave., Room 326  
Zoom Hub Link; <https://lccountymt.zoom.us/j/ze/hubenamt>**

**Time & Place**

A City Commission Administrative meeting was held on Tuesday, May 6, 2025 at 4:00 p.m. in room 326 of the City-County Building and via Zoom Hub Link: <https://lccountymt.zoom.us/j/ze/hubenamt>.

**Call to Work Session, Introductions**

**(00:00:24)** The following responded present:

**In Person**

City Manager Burton  
City Commissioner Reed  
City Commissioner Shirtliff  
Mayor Collins  
County Chief Administrative Officer Baltz  
County Commissioner Hunthausen  
County Commissioner Payne  
County Commissioner Rolfe

**Via Zoom**

City Commissioner Dean  
City Commissioner Logan

**Minutes**

A. 4-1-25 Joint Work Session Minutes

**Items**

**A. Support Services and 911**

**(00:03:45)** Police Chief Petty and 911 Operations Manager Slattery presented Item A.

**(00:11:22)** Commissioner Rolfe asked Finance Director Danielson about capital reserve funding.

**B. HATS/East Valley Bus System**



(00:12:43) Transportation Systems Director Knoepke and Deputy Director Couey presented Item B.

**C. City County Building Administration**

(00:22:03) Community Facilities Director Sampson presented Item C.

**D. HCTV – Public Television**

(00:32:50) HCTV Executive Director Faubion presented Item D.

**E. Information Technology & Services**

(00:37:42) IT&S Director Thomas presented Item E.

**F. Lewis & Clark Humane Society**

(00:54:04) There were no representatives in attendance to present Item F.

**G. Lewis & Clark Library**

(00:46:02) Library Director Finn presented Item G.

**H. Youth & Adult Community Service Program**

(00:49:17) County Finance Director Cornwell presented Item H.

**I. Historic Preservation – Operations & Projects**

(00:51:19) County Community Development and Planning Director McNally presented Item I.

**Public Comment**

(00:54:28) There were no further comments or questions from the Commission and/or public.

**Adjournment**

(00:54:44) There being no further business before the Commission, the meeting adjourned at 3:55pm.

***City of Helena, Montana***

**5/21/2025**

**To:**

Mayor Collins, the City of Helena Commission, and the Lewis & Clark County Board of Commissioners

**From:**

Amanda Opitz, City of Helena Grants Administrator  
Emily Fraizer, Executive Director, Helena Area Community Foundation

**Subject:**

Helena Area Community Foundation FY25 Grant Report

**Present Situation:**

Under the Dec. 2021 agreement between the Helena Area Community Foundation ("Foundation") and the City of Helena ("City"), the Foundation must provide an annual report to the City Commission regarding grant-making activities with City funds.

**Background Information:**

The City has historically provided direct funds to local nonprofits that provide services benefitting residents living in Helena and the surrounding area. Prior to Dec. 2021, nonprofits solicited these funds annually at a joint City-County Commission meeting. As a result, year-to-year this system yielded an often-repeated, narrow group of applicants.

To provide greater transparency and accountability in the use of these funds, in fiscal year 2021 the City solicited RFPs for projects/programs/events that supported specific priorities of the City Commission. Though the City was successful in reaching a broader audience than had typically participated in the program in the past, the administrative burden on staff and the organizations requesting funds was significant given the size of the grants and total amount of available funds.

On February 2, 2021, the City Commission gave consensus direction to staff at a joint City-County commission meeting to explore new options for dispersing funds to area nonprofits. At the joint Commission meeting on March 2, 2021, the City Commission gave consensus direction to staff to establish a partnership with the Helena Area Community Foundation to disperse available funds through the Foundation's grant-making cycle.

In December 2021, the City of Helena entered into an agreement with the Helena Area Community Foundation to disburse funds to local nonprofits that positively impact the residents of Helena.

Under this agreement, the City's annual donated funds are contingent upon budgetary approval. The City is not obligated to provide a donation. Funds are only to be distributed to 501(c)(3) organizations in the greater Helena, with priority to organizations operating within the Helena city limits, for projects with an expressed public purpose that benefit the residents of the City of Helena. In exchange for providing this service to the City, the Foundation may retain 5% in administration fees to help cover the cost of promotion and oversight of the grant-making process.

**Proposal/Objective:**

The objective of this presentation is to inform the joint City-County Commission of the Foundation's grant-making activities from the past year.

<b><u>Advantage:</u></b>	Partnering with the Foundation has allowed for a more transparent, accessible and efficient disbursement of funds.
<b><u>Notable Energy Impact:</u></b>	N/A
<b><u>Disadvantage:</u></b>	N/A
<b><u>Quasi-Judicial Item:</u></b>	False
<b><u>Notice of Public Hearing:</u></b>	False
<b><u>Staff Recommendation/ Recommended Motion:</u></b>	No staff recommendation at this time. Report is informational only.





# HELENA AREA COMMUNITY FOUNDATION

## City of Helena Grant Report 2025

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## HACF 501c(3) Letter

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAR 24 2005

Employer Identification Number:  
81-0536902

DLN:

17053064736025

Contact Person:

JOSEPH S ESTES

ID# 31121

Contact Telephone Number:

(877) 829-5500

Public Charity Status:

170(b)(1)(A)(vi)

LEWIS AND CLARK COUNTY COMMUNITY  
FOUNDATION  
PO BOX 1615  
HELENA, MT 59624

Dear Applicant:

Our letter dated JULY 2001, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

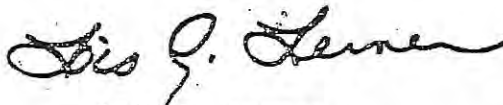
Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at [www.irs.gov](http://www.irs.gov).

If you have general questions about exempt organizations, please call our toll-free number shown in the heading between 8:30 a.m. - 5:30 p.m. Eastern time.

Please keep this letter in your permanent records.

Sincerely yours,



Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements

Letter 1050 (DO/CG)

HACF 2023 990

**Application for Extension of Time To File an Exempt Organization  
Return or Excise Taxes Related to Employee Benefit Plans**File a separate application for each return.  
Go to [www.irs.gov/Form8868](http://www.irs.gov/Form8868) for the latest information.

OMB No. 1545-0047

**Electronic filing (e-file).** You can electronically file Form 8868 to request up to a 6-month extension of time to file any of the forms listed below except for Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts. An extension request for Form 8870 must be sent to the IRS in a paper format (see instructions). For more details on the electronic filing of Form 8868, visit [www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits](http://www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits).

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Part I - Identification**

<b>Type or Print</b>  File by the due date for filing your return. See instructions.	Name of exempt organization, employer, or other filer, see instructions. <b>HELENA AREA COMMUNITY FOUNDATION</b>	Taxpayer identification number (TIN) <b>81-0536902</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>PO BOX 92</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>HELENA, MT 59624-0092</b>	

Enter the Return Code for the return that this application is for (file a separate application for each return) **01**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 4720 (other than individual)	09
Form 4720 (individual)	03	Form 5227	10
Form 990-PF	04	Form 6069	11
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 8870	12
Form 990-T (trust other than above)	06	Form 5330 (individual)	13
Form 990-T (corporation)	07	Form 5330 (other than individual)	14
Form 1041-A	08		

• After you enter your Return Code, complete either Part II or Part III. Part III, including signature, is applicable only for an extension of time to file Form 5330.

• If this application is for an extension of time to file Form 5330, you must enter the following information.

Plan Name \_\_\_\_\_  
Plan Number \_\_\_\_\_  
Plan Year Ending (MM/DD/YYYY) \_\_\_\_\_

**Part II - Automatic Extension of Time To File for Exempt Organizations (see instructions)**

The books are in the care of **EMILY FRAZIER**  
**33 S LAST CHANCE GULCH, STE 2A - HELENA, MT 59601**

Telephone No. **406-441-4955** Fax No. \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four-digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and TINs of all members the extension is for.

**1** I request an automatic 6-month extension of time until **NOVEMBER 15**, 20 **24**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
☒ calendar year 20 **23** or  
☐ tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_

**2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period

<b>3a</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>0.</b>
<b>b</b> If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>0.</b>
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>0.</b>

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2024)

Form **990**Department of the Treasury  
Internal Revenue Service**Return of Organization Exempt From Income Tax**Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)  
Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**Open to Public  
Inspection**A For the 2023 calendar year, or tax year beginning and ending****B** Check if applicable:

- ☐ Address change  
☐ Name change  
☐ Initial return  
☐ Final return/terminated  
☐ Amended return  
☐ Application pending

**C** Name of organization**HELENA AREA COMMUNITY FOUNDATION**

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

**PO BOX 92**

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

**HELENA, MT 59624-0092****F** Name and address of principal officer: **EMILY FRAZIER**  
**SAME AS C ABOVE****D** Employer identification number**81-0536902****E** Telephone number**406-441-4955****G** Gross receipts \$ **325,833.****H(a)** Is this a group returnfor subordinates? ..... ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions

**H(c)** Group exemption number**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) ( ) (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: **WWW.HELENAAREACOMMUNITYFOUNDATION.ORG****K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other**L** Year of formation: **2001** **M** State of legal domicile: **MT****Part I Summary**

Activities & Governance	<b>1</b>	Briefly describe the organization's mission or most significant activities: <b>FINANCIAL ASSISTANCE TO NONPROFITS BENEFITING LEWIS &amp; CLARK COUNTY RESIDENTS. FUNDRAISING</b>
	<b>2</b>	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.
	<b>3</b>	Number of voting members of the governing body (Part VI, line 1a) <b>3</b> <b>13</b>
	<b>4</b>	Number of independent voting members of the governing body (Part VI, line 1b) <b>4</b> <b>13</b>
	<b>5</b>	Total number of individuals employed in calendar year 2023 (Part V, line 2a) <b>5</b> <b>3</b>
	<b>6</b>	Total number of volunteers (estimate if necessary) <b>6</b> <b>20</b>
	<b>7a</b>	Total unrelated business revenue from Part VIII, column (C), line 12 <b>7a</b> <b>0.</b>
<b>7b</b>	Net unrelated business taxable income from Form 990-T, Part I, line 11 <b>7b</b> <b>0.</b>	
Revenue	<b>8</b>	Contributions and grants (Part VIII, line 1h) <b>8</b> <b>583,629.</b> <b>246,300.</b>
	<b>9</b>	Program service revenue (Part VIII, line 2g) <b>9</b> <b>445.</b> <b>170.</b>
	<b>10</b>	Investment income (Part VIII, column (A), lines 3, 4, and 7d) <b>10</b> <b>44,038.</b> <b>45,462.</b>
	<b>11</b>	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) <b>11</b> <b>-33,227.</b> <b>-20,706.</b>
	<b>12</b>	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) <b>12</b> <b>594,885.</b> <b>271,226.</b>
	Expenses	<b>13</b>
<b>14</b>		Benefits paid to or for members (Part IX, column (A), line 4) <b>14</b> <b>0.</b> <b>0.</b>
<b>15</b>		Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) <b>15</b> <b>67,740.</b> <b>113,793.</b>
<b>16a</b>		Professional fundraising fees (Part IX, column (A), line 11e) <b>16a</b> <b>0.</b> <b>0.</b>
<b>b</b>		Total fundraising expenses (Part IX, column (D), line 25) <b>28,899.</b>
<b>17</b>		Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) <b>17</b> <b>46,443.</b> <b>65,433.</b>
<b>18</b>		Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) <b>18</b> <b>607,838.</b> <b>265,037.</b>
Net Assets or Fund Balances	<b>19</b>	Revenue less expenses. Subtract line 18 from line 12 <b>19</b> <b>-12,953.</b> <b>6,189.</b>
	<b>20</b>	Total assets (Part X, line 16) <b>20</b> <b>512,478.</b> <b>525,648.</b>
	<b>21</b>	Total liabilities (Part X, line 26) <b>21</b> <b>35,719.</b> <b>9,692.</b>
	<b>22</b>	Net assets or fund balances. Subtract line 21 from line 20 <b>22</b> <b>476,759.</b> <b>515,956.</b>

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer	Date			
	<b>EMILY FRAZIER, EXECUTIVE DIRECTOR</b>				
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	<b>MANDY SMITH</b>	<b>MANDY SMITH</b>	<b>10/02/24</b>		<b>P01722770</b>
Preparer Use Only	Firm's name	Firm's EIN	Phone no.		
	<b>PINION, LLC</b>	<b>48-0567703</b>	<b>406-442-1040</b>		
	Firm's address				
	<b>828 GREAT NORTHERN BOULEVARD</b>				
	<b>HELENA, MT 59601</b>				

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

LHA For Paperwork Reduction Act Notice, see the separate instructions.

332001 12-21-23

Form **990** (2023)**SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION**

**Part III** Statement of Program Service AccomplishmentsCheck if Schedule O contains a response or note to any line in this Part III ☐**1** Briefly describe the organization's mission:

**TO PROVIDE FINANCIAL ASSISTANCE TO NONPROFITS BENEFITING LEWIS & CLARK COUNTY RESIDENTS. FUNDRAISING COSTS TO BUILD ENDOWMENT FOR GRANTS, WHICH IS THE EXEMPT PURPOSE.**

**2** Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O.

**3** Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O.

**4** Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.

Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

**4a** (Code: ) (Expenses \$ 199,721. including grants of \$ 85,811. ) (Revenue \$ 170. )

**THE GRANTS AS LISTED IN THIS RETURN ARE FUNDED WITH EARNINGS FROM AN ENDOWMENT FUND HELD AS AN ASSET OF MONTANA COMMUNITY FOUNDATION, AN AGENCY ENDOWMENT FUND HELD FOR HACF AT MCF, BOARD DESIGNATED FUNDS AND FUNDS RECEIVED FOR RE-GRANTING.**

**4b** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4c** (Code: ) (Expenses \$ including grants of \$ ) (Revenue \$ )**4d** Other program services (Describe on Schedule O.)

(Expenses \$ including grants of \$ ) (Revenue \$ )

**4e** Total program service expenses 199,721.

**Part IV Checklist of Required Schedules**

	Yes	No
<b>1</b> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>	<b>1</b> X	
<b>2</b> Is the organization required to complete <i>Schedule B, Schedule of Contributors</i> ? See instructions	<b>2</b> X	
<b>3</b> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>	<b>3</b>	X
<b>4</b> <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i>	<b>4</b>	X
<b>5</b> Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Rev. Proc. 98-19? <i>If "Yes," complete Schedule C, Part III</i>	<b>5</b>	X
<b>6</b> Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>	<b>6</b>	X
<b>7</b> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>	<b>7</b>	X
<b>8</b> Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>	<b>8</b>	X
<b>9</b> Did the organization report an amount in Part X, line 21, for escrow or custodial account liability; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>	<b>9</b>	X
<b>10</b> Did the organization, directly or through a related organization, hold assets in donor-restricted endowments or in quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>	<b>10</b> X	
<b>11</b> If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X, as applicable.		
<b>a</b> Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI</i>	<b>11a</b> X	
<b>b</b> Did the organization report an amount for investments - other securities in Part X, line 12, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII</i>	<b>11b</b>	X
<b>c</b> Did the organization report an amount for investments - program related in Part X, line 13, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII</i>	<b>11c</b>	X
<b>d</b> Did the organization report an amount for other assets in Part X, line 15, that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX</i>	<b>11d</b> X	
<b>e</b> Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X</i>	<b>11e</b>	X
<b>f</b> Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X</i>	<b>11f</b>	X
<b>12a</b> Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI and XII</i>	<b>12a</b>	X
<b>b</b> Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional</i>	<b>12b</b>	X
<b>13</b> Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>	<b>13</b>	X
<b>14a</b> Did the organization maintain an office, employees, or agents outside of the United States?	<b>14a</b>	X
<b>b</b> Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? <i>If "Yes," complete Schedule F, Parts I and IV</i>	<b>14b</b>	X
<b>15</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? <i>If "Yes," complete Schedule F, Parts II and IV</i>	<b>15</b>	X
<b>16</b> Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? <i>If "Yes," complete Schedule F, Parts III and IV</i>	<b>16</b>	X
<b>17</b> Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I. See instructions</i>	<b>17</b>	X
<b>18</b> Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>	<b>18</b> X	
<b>19</b> Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>	<b>19</b>	X
<b>20a</b> Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>	<b>20a</b>	X
<b>b</b> If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	<b>20b</b>	
<b>21</b> Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	<b>21</b> X	



**Part IV Checklist of Required Schedules** (continued)

	Yes	No
<b>22</b> Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> .....	<b>22</b> X	
<b>23</b> Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> .....	<b>23</b>	X
<b>24a</b> Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i> .....	<b>24a</b>	X
<b>b</b> Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? .....	<b>24b</b>	
<b>c</b> Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? .....	<b>24c</b>	
<b>d</b> Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? .....	<b>24d</b>	
<b>25a</b> <b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25a</b>	X
<b>b</b> Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> .....	<b>25b</b>	X
<b>26</b> Did the organization report any amount on Part X, line 5 or 22, for receivables from or payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons? <i>If "Yes," complete Schedule L, Part II</i> .....	<b>26</b>	X
<b>27</b> Did the organization provide a grant or other assistance to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity (including an employee thereof) or family member of any of these persons? <i>If "Yes," complete Schedule L, Part III</i> .....	<b>27</b>	X
<b>28</b> Was the organization a party to a business transaction with one of the following parties? (See the Schedule L, Part IV, instructions for applicable filing thresholds, conditions, and exceptions):		
<b>a</b> A current or former officer, director, trustee, key employee, creator or founder, or substantial contributor? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28a</b>	X
<b>b</b> A family member of any individual described in line 28a? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28b</b>	X
<b>c</b> A 35% controlled entity of one or more individuals and/or organizations described in line 28a or 28b? <i>If "Yes," complete Schedule L, Part IV</i> .....	<b>28c</b>	X
<b>29</b> Did the organization receive more than \$25,000 in noncash contributions? <i>If "Yes," complete Schedule M</i> .....	<b>29</b>	X
<b>30</b> Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> .....	<b>30</b>	X
<b>31</b> Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> .....	<b>31</b>	X
<b>32</b> Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> .....	<b>32</b>	X
<b>33</b> Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> .....	<b>33</b>	X
<b>34</b> Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i> .....	<b>34</b>	X
<b>35a</b> Did the organization have a controlled entity within the meaning of section 512(b)(13)? .....	<b>35a</b>	X
<b>b</b> If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>35b</b>	
<b>36</b> <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> .....	<b>36</b>	X
<b>37</b> Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i> .....	<b>37</b>	X
<b>38</b> Did the organization complete Schedule O and provide explanations on Schedule O for Part VI, lines 11b and 19? .....	<b>38</b> X	

Note: All Form 990 filers are required to complete Schedule O

**Part V Statements Regarding Other IRS Filings and Tax Compliance**Check if Schedule O contains a response or note to any line in this Part V ☐

	Yes	No
<b>1a</b> Enter the number reported in box 3 of Form 1096. Enter -0- if not applicable .....	<b>1a</b> 0	
<b>b</b> Enter the number of Forms W-2G included on line 1a. Enter -0- if not applicable .....	<b>1b</b> 0	
<b>c</b> Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners? .....	<b>1c</b> X	

**Part V** Statements Regarding Other IRS Filings and Tax Compliance (continued)

		Yes	No
<b>2a</b> Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	<b>2a</b> 3		
<b>b</b> If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	<b>2b</b>	X	
<b>3a</b> Did the organization have unrelated business gross income of \$1,000 or more during the year?	<b>3a</b>		X
<b>b</b> If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	<b>3b</b>		
<b>4a</b> At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	<b>4a</b>		X
<b>b</b> If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).			
<b>5a</b> Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	<b>5a</b>		X
<b>b</b> Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	<b>5b</b>		X
<b>c</b> If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	<b>5c</b>		
<b>6a</b> Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	<b>6a</b>		X
<b>b</b> If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	<b>6b</b>		
<b>7 Organizations that may receive deductible contributions under section 170(c).</b>			
<b>a</b> Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	<b>7a</b>		X
<b>b</b> If "Yes," did the organization notify the donor of the value of the goods or services provided?	<b>7b</b>		
<b>c</b> Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	<b>7c</b>		X
<b>d</b> If "Yes," indicate the number of Forms 8282 filed during the year	<b>7d</b>		
<b>e</b> Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<b>7e</b>		X
<b>f</b> Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<b>7f</b>		X
<b>g</b> If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	<b>7g</b>		
<b>h</b> If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	<b>7h</b>		
<b>8 Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	<b>8</b>		
<b>9 Sponsoring organizations maintaining donor advised funds.</b>			
<b>a</b> Did the sponsoring organization make any taxable distributions under section 4966?	<b>9a</b>		
<b>b</b> Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	<b>9b</b>		
<b>10 Section 501(c)(7) organizations.</b> Enter:			
<b>a</b> Initiation fees and capital contributions included on Part VIII, line 12	<b>10a</b>		
<b>b</b> Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	<b>10b</b>		
<b>11 Section 501(c)(12) organizations.</b> Enter:			
<b>a</b> Gross income from members or shareholders	<b>11a</b>		
<b>b</b> Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	<b>11b</b>		
<b>12a Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?	<b>12a</b>		
<b>b</b> If "Yes," enter the amount of tax-exempt interest received or accrued during the year	<b>12b</b>		
<b>13 Section 501(c)(29) qualified nonprofit health insurance issuers.</b>			
<b>a</b> Is the organization licensed to issue qualified health plans in more than one state? <b>Note:</b> See the instructions for additional information the organization must report on Schedule O.	<b>13a</b>		
<b>b</b> Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	<b>13b</b>		
<b>c</b> Enter the amount of reserves on hand	<b>13c</b>		
<b>14a</b> Did the organization receive any payments for indoor tanning services during the tax year?	<b>14a</b>		X
<b>b</b> If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	<b>14b</b>		
<b>15</b> Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	<b>15</b>		X
<b>16</b> Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	<b>16</b>		X
<b>17 Section 501(c)(21) organizations.</b> Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	<b>17</b>		

**Part VI Governance, Management, and Disclosure.** For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes on Schedule O. See instructions.

Check if Schedule O contains a response or note to any line in this Part VI

☒**Section A. Governing Body and Management**

	1a	1b	Yes	No
<b>1a</b> Enter the number of voting members of the governing body at the end of the tax year ..... If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.	13			
<b>b</b> Enter the number of voting members included on line 1a, above, who are independent .....		13		
<b>2</b> Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? .....				X
<b>3</b> Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person? .....				X
<b>4</b> Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? .....				X
<b>5</b> Did the organization become aware during the year of a significant diversion of the organization's assets? .....				X
<b>6</b> Did the organization have members or stockholders? .....				X
<b>7a</b> Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? .....				X
<b>b</b> Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? .....				X
<b>8</b> Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:				
<b>a</b> The governing body? .....			X	
<b>b</b> Each committee with authority to act on behalf of the governing body? .....			X	
<b>9</b> Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O .....				X

**Section B. Policies** (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
<b>10a</b> Did the organization have local chapters, branches, or affiliates? .....		X
<b>b</b> If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? .....		
<b>11a</b> Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? .....	X	
<b>b</b> Describe on Schedule O the process, if any, used by the organization to review this Form 990.		
<b>12a</b> Did the organization have a written conflict of interest policy? If "No," go to line 13 .....	X	
<b>b</b> Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? .....	X	
<b>c</b> Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe on Schedule O how this was done .....	X	
<b>13</b> Did the organization have a written whistleblower policy? .....	X	
<b>14</b> Did the organization have a written document retention and destruction policy? .....	X	
<b>15</b> Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
<b>a</b> The organization's CEO, Executive Director, or top management official .....	X	
<b>b</b> Other officers or key employees of the organization .....		X
If "Yes" to line 15a or 15b, describe the process on Schedule O. See instructions.		
<b>16a</b> Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? .....		X
<b>b</b> If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? .....		

**Section C. Disclosure**

**17** List the states with which a copy of this Form 990 is required to be filed NONE

**18** Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.  
☒ Own website    ☐ Another's website    ☒ Upon request    ☐ Other (explain on Schedule O)

**19** Describe on Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year.

**20** State the name, address, and telephone number of the person who possesses the organization's books and records  
**EMILY FRAZIER - 406-441-4955**  
**33 S LAST CHANCE GULCH, STE 2A, HELENA, MT 59601**

**Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Check if Schedule O contains a response or note to any line in this Part VII ☐**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees****1a** Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

- List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2, box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

See the instructions for the order in which to list the persons above.

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(1) EMILY FRAZIER EXECUTIVE DIRECTOR	40.00			X				62,283.	0.	1,666.
(2) BRIAN NELSON DIRECTOR	1.00	X						0.	0.	0.
(3) JOYCE DAY DIRECTOR	1.00	X						0.	0.	0.
(4) ELLIE WEBSTER DIRECTOR	1.00	X						0.	0.	0.
(5) JAN BROWN DIRECTOR	1.00	X						0.	0.	0.
(6) KIM LLOYD PRESIDENT	3.00	X		X				0.	0.	0.
(7) JOHN MOORE DIRECTOR	1.00	X						0.	0.	0.
(8) RAYLEE HONEYCUTT VICE PRESIDENT	3.00	X		X				0.	0.	0.
(9) MARK BARRY TREASURER	3.00	X		X				0.	0.	0.
(10) JACKIE JONES DIRECTOR	1.00	X						0.	0.	0.
(11) DARANNE DUNNING SECRETARY	3.00	X		X				0.	0.	0.
(12) SARA BERG DIRECTOR	1.00	X						0.	0.	0.
(13) STEPHANIE BULL DIRECTOR	1.00	X						0.	0.	0.
(14) JEANNIE ETCHART PAST PRESIDENT	1.00	X						0.	0.	0.

**Part VII** Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
<b>1b Subtotal</b> .....								62,283.	0.	1,666.
<b>c Total from continuation sheets to Part VII, Section A</b> .....								0.	0.	0.
<b>d Total (add lines 1b and 1c)</b> .....								62,283.	0.	1,666.

**2** Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization

0

- 3** Did the organization list any **former** officer, director, trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual* .....
- 4** For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? *If "Yes," complete Schedule J for such individual* .....
- 5** Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person* .....

	Yes	No
<b>3</b>		X
<b>4</b>		X
<b>5</b>		X

**Section B. Independent Contractors**

**1** Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

**2** Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization

0

Form 990 (2023)

**Part VIII Statement of Revenue**Check if Schedule O contains a response or note to any line in this Part VIII ☐

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
<b>Contributions, Gifts, Grants and Other Similar Amounts</b>	<b>1 a</b> Federated campaigns .....	<b>1a</b>					
	<b>b</b> Membership dues .....	<b>1b</b>					
	<b>c</b> Fundraising events .....	<b>1c</b>	28,819.				
	<b>d</b> Related organizations .....	<b>1d</b>					
	<b>e</b> Government grants (contributions) .....	<b>1e</b>	142,497.				
	<b>f</b> All other contributions, gifts, grants, and similar amounts not included above ...	<b>1f</b>	74,984.				
	<b>g</b> Noncash contributions included in lines 1a-1f	<b>1g</b>	\$				
	<b>h Total.</b> Add lines 1a-1f .....						
<b>Program Service Revenue</b>	<b>2 a</b> MISCELLANEOUS REVENUE	<b>Business Code</b>	561000	170.	170.		
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> .....						
	<b>e</b> .....						
	<b>f</b> All other program service revenue .....						
	<b>g Total.</b> Add lines 2a-2f .....				170.		
	<b>Other Revenue</b>	<b>3</b> Investment income (including dividends, interest, and other similar amounts) .....			42,989.		
<b>4</b> Income from investment of tax-exempt bond proceeds .....							
<b>5</b> Royalties .....							
<b>6 a</b> Gross rents .....		<b>6a</b>	(i) Real (ii) Personal				
<b>b</b> Less: rental expenses ...		<b>6b</b>					
<b>c</b> Rental income or (loss) .....		<b>6c</b>					
<b>d</b> Net rental income or (loss) .....							
<b>7 a</b> Gross amount from sales of assets other than inventory .....		<b>7a</b>	(i) Securities (ii) Other				
<b>b</b> Less: cost or other basis and sales expenses .....		<b>7b</b>	0.				
<b>c</b> Gain or (loss) .....		<b>7c</b>	2,473.				
<b>d</b> Net gain or (loss) .....							
<b>8 a</b> Gross income from fundraising events (not including \$ 28,819. of contributions reported on line 1c). See Part IV, line 18 .....		<b>8a</b>	33,901.				
<b>b</b> Less: direct expenses .....		<b>8b</b>	54,607.				
<b>c</b> Net income or (loss) from fundraising events .....							
<b>9 a</b> Gross income from gaming activities. See Part IV, line 19 .....		<b>9a</b>					
<b>b</b> Less: direct expenses .....	<b>9b</b>						
<b>c</b> Net income or (loss) from gaming activities .....							
<b>10 a</b> Gross sales of inventory, less returns and allowances .....	<b>10a</b>						
<b>b</b> Less: cost of goods sold .....	<b>10b</b>						
<b>c</b> Net income or (loss) from sales of inventory .....							
<b>Miscellaneous Revenue</b>	<b>11 a</b> .....	<b>Business Code</b>					
	<b>b</b> .....						
	<b>c</b> .....						
	<b>d</b> All other revenue .....						
	<b>e Total.</b> Add lines 11a-11d .....						
	<b>12 Total revenue.</b> See instructions .....				271,226.	170.	0.

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
<b>1</b> Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 ...	75,349.	75,349.		
<b>2</b> Grants and other assistance to domestic individuals. See Part IV, line 22 .....	10,462.	10,462.		
<b>3</b> Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 .....				
<b>4</b> Benefits paid to or for members .....				
<b>5</b> Compensation of current officers, directors, trustees, and key employees .....	63,949.	51,159.		12,790.
<b>6</b> Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) .....				
<b>7</b> Other salaries and wages .....	38,853.	30,431.		8,422.
<b>8</b> Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
<b>9</b> Other employee benefits .....	2,174.	2,174.		
<b>10</b> Payroll taxes .....	8,817.	8,817.		
<b>11</b> Fees for services (nonemployees):				
<b>a</b> Management .....				
<b>b</b> Legal .....				
<b>c</b> Accounting .....	11,173.	3,778.	7,395.	
<b>d</b> Lobbying .....				
<b>e</b> Professional fundraising services. See Part IV, line 17				
<b>f</b> Investment management fees .....	4,329.	4,329.		
<b>g</b> Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)				
<b>12</b> Advertising and promotion .....	1,460.	162.	567.	731.
<b>13</b> Office expenses .....	10,276.	3,493.	3,522.	3,261.
<b>14</b> Information technology .....	1,534.	655.	879.	
<b>15</b> Royalties .....				
<b>16</b> Occupancy .....	12,769.	1,029.	11,740.	
<b>17</b> Travel .....				
<b>18</b> Payments of travel or entertainment expenses for any federal, state, or local public officials ...				
<b>19</b> Conferences, conventions, and meetings .....	3,647.	2,354.	1,293.	
<b>20</b> Interest .....				
<b>21</b> Payments to affiliates .....				
<b>22</b> Depreciation, depletion, and amortization .....	250.	250.		
<b>23</b> Insurance .....	2,073.	2,073.		
<b>24</b> Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
<b>a DUES/SUBSCRIPTIONS</b>	11,038.	2,936.	8,102.	
<b>b PRINTING/COPYING</b>	5,282.		2,919.	2,363.
<b>c FUNDRAISING SUPPLIES</b>	1,332.			1,332.
<b>d BANK/OTHER FEES</b>	270.	270.		
<b>e</b> All other expenses .....				
<b>25 Total functional expenses.</b> Add lines 1 through 24e	265,037.	199,721.	36,417.	28,899.
<b>26 Joint costs.</b> Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

**Part X Balance Sheet**Check if Schedule O contains a response or note to any line in this Part X ☐

		(A) Beginning of year		(B) End of year
<b>Assets</b>	<b>1</b> Cash - non-interest-bearing .....	82,677.	<b>1</b>	71,220.
	<b>2</b> Savings and temporary cash investments .....		<b>2</b>	
	<b>3</b> Pledges and grants receivable, net .....		<b>3</b>	
	<b>4</b> Accounts receivable, net .....	14,128.	<b>4</b>	27,792.
	<b>5</b> Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>5</b>	
	<b>6</b> Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B) .....		<b>6</b>	
	<b>7</b> Notes and loans receivable, net .....		<b>7</b>	
	<b>8</b> Inventories for sale or use .....		<b>8</b>	
	<b>9</b> Prepaid expenses and deferred charges .....		<b>9</b>	
	<b>10a</b> Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D .....	<b>10a</b> 4,950.		
	<b>b</b> Less: accumulated depreciation .....	<b>10b</b> 3,950.	<b>10c</b> 0.	1,000.
	<b>11</b> Investments - publicly traded securities .....	64,080.	<b>11</b>	69,250.
	<b>12</b> Investments - other securities. See Part IV, line 11 .....		<b>12</b>	
	<b>13</b> Investments - program-related. See Part IV, line 11 .....		<b>13</b>	
	<b>14</b> Intangible assets .....		<b>14</b>	
	<b>15</b> Other assets. See Part IV, line 11 .....	351,593.	<b>15</b>	356,386.
<b>16</b> <b>Total assets.</b> Add lines 1 through 15 (must equal line 33) .....	512,478.	<b>16</b>	525,648.	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses .....	35,719.	<b>17</b>	9,692.
	<b>18</b> Grants payable .....		<b>18</b>	
	<b>19</b> Deferred revenue .....		<b>19</b>	
	<b>20</b> Tax-exempt bond liabilities .....		<b>20</b>	
	<b>21</b> Escrow or custodial account liability. Complete Part IV of Schedule D .....		<b>21</b>	
	<b>22</b> Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons .....		<b>22</b>	
	<b>23</b> Secured mortgages and notes payable to unrelated third parties .....		<b>23</b>	
	<b>24</b> Unsecured notes and loans payable to unrelated third parties .....		<b>24</b>	
	<b>25</b> Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D .....		<b>25</b>	
	<b>26</b> <b>Total liabilities.</b> Add lines 17 through 25 .....	35,719.	<b>26</b>	9,692.
<b>Net Assets or Fund Balances</b>	<b>Organizations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27, 28, 32, and 33.</b>			
	<b>27</b> Net assets without donor restrictions .....	476,759.	<b>27</b>	515,956.
	<b>28</b> Net assets with donor restrictions .....		<b>28</b>	
	<b>Organizations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 29 through 33.</b>			
	<b>29</b> Capital stock or trust principal, or current funds .....		<b>29</b>	
	<b>30</b> Paid-in or capital surplus, or land, building, or equipment fund .....		<b>30</b>	
	<b>31</b> Retained earnings, endowment, accumulated income, or other funds .....		<b>31</b>	
	<b>32</b> Total net assets or fund balances .....	476,759.	<b>32</b>	515,956.
	<b>33</b> Total liabilities and net assets/fund balances .....	512,478.	<b>33</b>	525,648.

Form 990 (2023)



**Part XI Reconciliation of Net Assets**Check if Schedule O contains a response or note to any line in this Part XI ☐

<b>1</b>	Total revenue (must equal Part VIII, column (A), line 12)	<b>1</b>	271,226.
<b>2</b>	Total expenses (must equal Part IX, column (A), line 25)	<b>2</b>	265,037.
<b>3</b>	Revenue less expenses. Subtract line 2 from line 1	<b>3</b>	6,189.
<b>4</b>	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	<b>4</b>	476,759.
<b>5</b>	Net unrealized gains (losses) on investments	<b>5</b>	33,006.
<b>6</b>	Donated services and use of facilities	<b>6</b>	
<b>7</b>	Investment expenses	<b>7</b>	
<b>8</b>	Prior period adjustments	<b>8</b>	
<b>9</b>	Other changes in net assets or fund balances (explain on Schedule O)	<b>9</b>	0.
<b>10</b>	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	<b>10</b>	515,954.

**Part XII Financial Statements and Reporting**Check if Schedule O contains a response or note to any line in this Part XII ☐

	Yes	No
<b>1</b> Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain on Schedule O.		
<b>2a</b> Were the organization's financial statements compiled or reviewed by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2a</b>	<b>X</b>
<b>b</b> Were the organization's financial statements audited by an independent accountant? _____ If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both: <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	<b>2b</b>	<b>X</b>
<b>c</b> If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? _____ If the organization changed either its oversight process or selection process during the tax year, explain on Schedule O.	<b>2c</b>	
<b>3a</b> As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Uniform Guidance, 2 C.F.R. Part 200, Subpart F? _____	<b>3a</b>	<b>X</b>
<b>b</b> If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why on Schedule O and describe any steps taken to undergo such audits _____	<b>3b</b>	

Form 990 (2023)

**SCHEDULE A**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.  
Attach to Form 990 or Form 990-EZ.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number

81-0536902

**Part I Reason for Public Charity Status.** (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

- 1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990).)
- 3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state: \_\_\_\_\_
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7 ☒ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi).** (Complete Part II.)
- 9 ☐ An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university: \_\_\_\_\_
- 10 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2).** (Complete Part III.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4).**
- 12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box on lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. **You must complete Part IV, Sections A and B.**
- b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). **You must complete Part IV, Sections A and C.**
- c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). **You must complete Part IV, Sections A, D, and E.**
- d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). **You must complete Part IV, Sections A and D, and Part V.**
- e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations \_\_\_\_\_

g Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-10 above (see instructions))	(iv) Is the organization listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
<b>Total</b>						

**Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)**

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....	71,650.	134,573.	212,075.	583,629.	246,300.	1248227.
<b>2</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>3</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>4 Total.</b> Add lines 1 through 3 .....	71,650.	134,573.	212,075.	583,629.	246,300.	1248227.
<b>5</b> The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) .....						
<b>6 Public support.</b> Subtract line 5 from line 4.						1248227.

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>7</b> Amounts from line 4 .....	71,650.	134,573.	212,075.	583,629.	246,300.	1248227.
<b>8</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....	3,771.	4,246.	28,890.	30,662.	42,989.	110,558.
<b>9</b> Net income from unrelated business activities, whether or not the business is regularly carried on .....						
<b>10</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>11 Total support.</b> Add lines 7 through 10						1358785.
<b>12</b> Gross receipts from related activities, etc. (see instructions) .....					12	48,526.
<b>13 First 5 years.</b> If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and <b>stop here</b> .....						

**Section C. Computation of Public Support Percentage**

<b>14</b> Public support percentage for 2023 (line 6, column (f), divided by line 11, column (f)) .....	<b>14</b>	91.86	%
<b>15</b> Public support percentage from 2022 Schedule A, Part II, line 14 .....	<b>15</b>	93.83	%
<b>16a 33 1/3% support test - 2023.</b> If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			
			<input checked="" type="checkbox"/>
<b>b 33 1/3% support test - 2022.</b> If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and <b>stop here.</b> The organization qualifies as a publicly supported organization .....			
			<input type="checkbox"/>
<b>17a 10% -facts-and-circumstances test - 2023.</b> If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			
			<input type="checkbox"/>
<b>b 10% -facts-and-circumstances test - 2022.</b> If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and <b>stop here.</b> Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization .....			
			<input type="checkbox"/>
<b>18 Private foundation.</b> If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions .....			
			<input type="checkbox"/>

Schedule A (Form 990) 2023

**Part III Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

**Section A. Public Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>1</b> Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.") .....						
<b>2</b> Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose .....						
<b>3</b> Gross receipts from activities that are not an unrelated trade or business under section 513 .....						
<b>4</b> Tax revenues levied for the organization's benefit and either paid to or expended on its behalf .....						
<b>5</b> The value of services or facilities furnished by a governmental unit to the organization without charge .....						
<b>6 Total.</b> Add lines 1 through 5 .....						
<b>7a</b> Amounts included on lines 1, 2, and 3 received from disqualified persons .....						
<b>b</b> Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year .....						
<b>c</b> Add lines 7a and 7b .....						
<b>8 Public support.</b> (Subtract line 7c from line 6.)						

**Section B. Total Support**

Calendar year (or fiscal year beginning in)	(a) 2019	(b) 2020	(c) 2021	(d) 2022	(e) 2023	(f) Total
<b>9</b> Amounts from line 6 .....						
<b>10a</b> Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources .....						
<b>b</b> Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 .....						
<b>c</b> Add lines 10a and 10b .....						
<b>11</b> Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on .....						
<b>12</b> Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) .....						
<b>13 Total support.</b> (Add lines 9, 10c, 11, and 12.)						

**14 First 5 years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ☐

**Section C. Computation of Public Support Percentage**

<b>15</b> Public support percentage for 2023 (line 8, column (f), divided by line 13, column (f)) .....	<b>15</b>	%
<b>16</b> Public support percentage from 2022 Schedule A, Part III, line 15 .....	<b>16</b>	%

**Section D. Computation of Investment Income Percentage**

<b>17</b> Investment income percentage for <b>2023</b> (line 10c, column (f), divided by line 13, column (f)) .....	<b>17</b>	%
<b>18</b> Investment income percentage from <b>2022</b> Schedule A, Part III, line 17 .....	<b>18</b>	%

**19a 33 1/3% support tests - 2023.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**b 33 1/3% support tests - 2022.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

**20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐

**Part IV Supporting Organizations**

(Complete only if you checked a box on line 12 of Part I. If you checked box 12a, Part I, complete Sections A and B. If you checked box 12b, Part I, complete Sections A and C. If you checked box 12c, Part I, complete Sections A, D, and E. If you checked box 12d, Part I, complete Sections A and D, and complete Part V.)

**Section A. All Supporting Organizations**

	Yes	No
<b>1</b> Are all of the organization's supported organizations listed by name in the organization's governing documents? <i>If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.</i>		
<b>2</b> Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? <i>If "Yes," explain in Part VI how the organization determined that the supported organization was described in section 509(a)(1) or (2).</i>		
<b>3a</b> Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? <i>If "Yes," answer lines 3b and 3c below.</i>		
<b>b</b> Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? <i>If "Yes," describe in Part VI when and how the organization made the determination.</i>		
<b>c</b> Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? <i>If "Yes," explain in Part VI what controls the organization put in place to ensure such use.</i>		
<b>4a</b> Was any supported organization not organized in the United States ("foreign supported organization")? <i>If "Yes," and if you checked box 12a or 12b in Part I, answer lines 4b and 4c below.</i>		
<b>b</b> Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? <i>If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.</i>		
<b>c</b> Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? <i>If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.</i>		
<b>5a</b> Did the organization add, substitute, or remove any supported organizations during the tax year? <i>If "Yes," answer lines 5b and 5c below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).</i>		
<b>b</b> <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?		
<b>c</b> <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?		
<b>6</b> Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? <i>If "Yes," provide detail in Part VI.</i>		
<b>7</b> Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (as defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>8</b> Did the organization make a loan to a disqualified person (as defined in section 4958) not described on line 7? <i>If "Yes," complete Part I of Schedule L (Form 990).</i>		
<b>9a</b> Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons, as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? <i>If "Yes," provide detail in Part VI.</i>		
<b>b</b> Did one or more disqualified persons (as defined on line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>c</b> Did a disqualified person (as defined on line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? <i>If "Yes," provide detail in Part VI.</i>		
<b>10a</b> Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? <i>If "Yes," answer line 10b below.</i>		
<b>b</b> Did the organization have any excess business holdings in the tax year? <i>(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)</i>		

**Part IV** Supporting Organizations (continued)

	Yes	No
<b>11</b> Has the organization accepted a gift or contribution from any of the following persons?		
<b>a</b> A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
<b>11a</b>		
<b>b</b> A family member of a person described on line 11a above?		
<b>11b</b>		
<b>c</b> A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in <b>Part VI</b> .		
<b>11c</b>		

**Section B. Type I Supporting Organizations**

	Yes	No
<b>1</b> Did the governing body, members of the governing body, officers acting in their official capacity, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's officers, directors, or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove officers, directors, or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
<b>1</b>		
<b>2</b> Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised, or controlled the supporting organization.		
<b>2</b>		

**Section C. Type II Supporting Organizations**

	Yes	No
<b>1</b> Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		
<b>1</b>		

**Section D. All Type III Supporting Organizations**

	Yes	No
<b>1</b> Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
<b>1</b>		
<b>2</b> Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
<b>2</b>		
<b>3</b> By reason of the relationship described on line 2, above, did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		
<b>3</b>		

**Section E. Type III Functionally Integrated Supporting Organizations**

	Yes	No
<b>1</b> Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
<b>a</b> <input type="checkbox"/> The organization satisfied the Activities Test. Complete line 2 below.		
<b>b</b> <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete line 3 below.		
<b>c</b> <input type="checkbox"/> The organization supported a governmental entity. Describe in <b>Part VI</b> how you supported a governmental entity (see instructions).		
<b>2</b> Activities Test. Answer lines 2a and 2b below.		
<b>a</b> Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI</b> identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
<b>2a</b>		
<b>b</b> Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
<b>2b</b>		
<b>3</b> Parent of Supported Organizations. Answer lines 3a and 3b below.		
<b>a</b> Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No" provide details in <b>Part VI</b> .		
<b>3a</b>		
<b>b</b> Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in <b>Part VI</b> the role played by the organization in this regard.		
<b>3b</b>		

**Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations**

- 1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 ( *explain in Part VI*). See instructions.  
All other Type III non-functionally integrated supporting organizations must complete Sections A through E.

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3.	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6, and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year):		
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors ( <i>explain in detail in Part VI</i> ):		
2	Acquisition indebtedness applicable to non-exempt-use assets	2	
3	Subtract line 2 from line 1d.	3	
4	Cash deemed held for exempt use. Enter 0.015 of line 3 (for greater amount, see instructions).	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by 0.035.	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, column A)	1	
2	Enter 0.85 of line 1.	2	
3	Minimum asset amount for prior year (from Section B, line 8, column A)	3	
4	Enter greater of line 2 or line 3.	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions).	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally integrated Type III supporting organization (see instructions).		

Schedule A (Form 990) 2023

**Part V** Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**Section D - Distributions**

		Current Year
<b>1</b>	Amounts paid to supported organizations to accomplish exempt purposes	<b>1</b>
<b>2</b>	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	<b>2</b>
<b>3</b>	Administrative expenses paid to accomplish exempt purposes of supported organizations	<b>3</b>
<b>4</b>	Amounts paid to acquire exempt-use assets	<b>4</b>
<b>5</b>	Qualified set-aside amounts (prior IRS approval required - <i>provide details in Part VI</i> )	<b>5</b>
<b>6</b>	Other distributions ( <i>describe in Part VI</i> ). See instructions.	<b>6</b>
<b>7</b>	<b>Total annual distributions.</b> Add lines 1 through 6.	<b>7</b>
<b>8</b>	Distributions to attentive supported organizations to which the organization is responsive ( <i>provide details in Part VI</i> ). See instructions.	<b>8</b>
<b>9</b>	Distributable amount for 2023 from Section C, line 6	<b>9</b>
<b>10</b>	Line 8 amount divided by line 9 amount	<b>10</b>

<b>Section E - Distribution Allocations</b> (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2023	(iii) Distributable Amount for 2023
<b>1</b> Distributable amount for 2023 from Section C, line 6			
<b>2</b> Underdistributions, if any, for years prior to 2023 (reasonable cause required - <i>explain in Part VI</i> ). See instructions.			
<b>3</b> Excess distributions carryover, if any, to 2023			
<b>a</b> From 2018			
<b>b</b> From 2019			
<b>c</b> From 2020			
<b>d</b> From 2021			
<b>e</b> From 2022			
<b>f</b> <b>Total</b> of lines 3a through 3e			
<b>g</b> Applied to underdistributions of prior years			
<b>h</b> Applied to 2023 distributable amount			
<b>i</b> Carryover from 2018 not applied (see instructions)			
<b>j</b> Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
<b>4</b> Distributions for 2023 from Section D, line 7: \$			
<b>a</b> Applied to underdistributions of prior years			
<b>b</b> Applied to 2023 distributable amount			
<b>c</b> Remainder. Subtract lines 4a and 4b from line 4.			
<b>5</b> Remaining underdistributions for years prior to 2023, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>6</b> Remaining underdistributions for 2023. Subtract lines 3h and 4b from line 1. For result greater than zero, <i>explain in Part VI</i> . See instructions.			
<b>7</b> <b>Excess distributions carryover to 2024.</b> Add lines 3j and 4c.			
<b>8</b> Breakdown of line 7:			
<b>a</b> Excess from 2019			
<b>b</b> Excess from 2020			
<b>c</b> Excess from 2021			
<b>d</b> Excess from 2022			
<b>e</b> Excess from 2023			

Schedule A (Form 990) 2023



**Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.  
(See instructions.)

**Schedule B**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990, 990-EZ, or 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number

81-0536902

Organization type (check one):

**Filers of:**

**Section:**

Form 990 or 990-EZ

☒ 501(c)( 3 ) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

☒ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ..... \$ .....

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2023)

Name of organization	Employer identification number
HELENA AREA COMMUNITY FOUNDATION	81-0536902

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	RICHARD & SUZANNE THWEATT 36 HARRISON AVE HELENA, MT 59601	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	OPPORTUNITY BANK PO BOX 4999 HELENA, MT 59604-4999	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

81-0536902

## Part II

[illegible]

Name of organization	Employer identification number
HELENA AREA COMMUNITY FOUNDATION	81-0536902

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once.) \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**SCHEDULE D**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Financial Statements**

Complete if the organization answered "Yes" on Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

Attach to Form 990.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number

81-0536902

**Part I**

**Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.** Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year .....		
2 Aggregate value of contributions to (during year) .....		
3 Aggregate value of grants from (during year) .....		
4 Aggregate value at end of year .....		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? .....	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Part II**

**Conservation Easements.** Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

<input type="checkbox"/> Preservation of land for public use (for example, recreation or education)	<input type="checkbox"/> Preservation of a historically important land area
<input type="checkbox"/> Protection of natural habitat	<input type="checkbox"/> Preservation of a certified historic structure
<input type="checkbox"/> Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Tax Year
a Total number of conservation easements .....	2a
b Total acreage restricted by conservation easements .....	2b
c Number of conservation easements on a certified historic structure included on line 2a .....	2c
d Number of conservation easements included on line 2c acquired after July 25, 2006, and not on a historic structure listed in the National Register .....	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year .....

4 Number of states where property subject to conservation easement is located .....

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? .....

☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year .....

8 Does each conservation easement reported on line 2d above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? .....

☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

**Part III**

**Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under FASB ASC 958, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide in Part XIII the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under FASB ASC 958, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items.

(i) Revenue included on Form 990, Part VIII, line 1 .....

(ii) Assets included in Form 990, Part X .....

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under FASB ASC 958 relating to these items:

a Revenue included on Form 990, Part VIII, line 1 .....

b Assets included in Form 990, Part X .....

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule D (Form 990) 2023

**Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets** (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).

a ☐ Public exhibition

d ☐ Loan or exchange program

b ☐ Scholarly research

e ☐ Other \_\_\_\_\_

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets

to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

**Part IV Escrow and Custodial Arrangements** Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table:

	Amount
c Beginning balance	1c
d Additions during the year	1d
e Distributions during the year	1e
f Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

**Part V Endowment Funds** Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance	335,087.	371,974.	335,715.	312,522.	282,200.
b Contributions		33,000.		40,969.	47,537.
c Net investment earnings, gains, and losses	39,232.	-65,326.	55,416.		
d Grants or scholarships					
e Other expenditures for facilities and programs			14,627.	13,944.	13,394.
f Administrative expenses	20,433.	4,561.	4,530.	3,832.	3,821.
g End of year balance	353,886.	335,087.	371,974.	335,715.	312,522.

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:

a Board designated or quasi-endowment \_\_\_\_\_ %

b Permanent endowment \_\_\_\_\_ %

c Term endowment \_\_\_\_\_ %

The percentages on lines 2a, 2b, and 2c should equal 100%.

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

(i) Unrelated organizations? ☐ Yes ☒ No

(ii) Related organizations? ☐ Yes ☒ No

b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☒ No

4 Describe in Part XIII the intended uses of the organization's endowment funds.

**Part VI Land, Buildings, and Equipment**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other		4,950.	3,950.	1,000.
<b>Total.</b> Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				1,000.

Schedule D (Form 990) 2023

**Part VII Investments - Other Securities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) Financial derivatives .....		
(2) Closely held equity interests .....		
(3) Other .....		
(A) .....		
(B) .....		
(C) .....		
(D) .....		
(E) .....		
(F) .....		
(G) .....		
(H) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 12, col. (B))		

**Part VIII Investments - Program Related.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
(1) .....		
(2) .....		
(3) .....		
(4) .....		
(5) .....		
(6) .....		
(7) .....		
(8) .....		
(9) .....		
<b>Total.</b> (Col. (b) must equal Form 990, Part X, line 13, col. (B))		

**Part IX Other Assets**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15.

(a) Description	(b) Book value
(1) ENDOWMENT DISTRIBUTION RECEIVABLE	2,500.
(2) AGENCY ENDOWMENT	353,886.
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 15, col. (B))	356,386.

**Part X Other Liabilities**

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

(a) Description of liability	(b) Book value
1. (1) Federal income taxes	
(2) .....	
(3) .....	
(4) .....	
(5) .....	
(6) .....	
(7) .....	
(8) .....	
(9) .....	
<b>Total.</b> (Column (b) must equal Form 990, Part X, line 25, col. (B))	

2. Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FASB ASC 740. Check here if the text of the footnote has been provided in Part XIII ... ☐

Schedule D (Form 990) 2023





Department of the Treasury  
Internal Revenue Service

### Supplemental Information Regarding Fundraising or Gaming Activities

**Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.**

**Attach to Form 990 or Form 990-EZ.**

**Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.**

OMB No. 1545-0047

# 2023

**Open to Public Inspection**

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number

81-0536902

## Part I

**Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

**1** Indicate whether the organization raised funds through any of the following activities. Check all that apply.

- a** ☐ Mail solicitations
- b** ☐ Internet and email solicitations
- c** ☐ Phone solicitations
- d** ☐ In-person solicitations
- e** ☐ Solicitation of non-government grants
- f** ☐ Solicitation of government grants
- g** ☐ Special fundraising events

**2 a** Did the organization have a written or oral agreement with any individual (including officers, directors, trustees, or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☐ Yes☐ **No**

**b** If "Yes," list the 10 highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization.

[illegible]

<b>Total</b> .....			
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**3** List all states in which the organization is registered or licensed to solicit contributions or has been notified it is exempt from registration or licensing.

**Part II Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000.

		(a) Event #1 HELENA HOLIDAY CRUISE (event type)	(b) Event #2 GREATER HELENA GIVES (event type)	(c) Other events NONE (total number)	(d) Total events (add col. (a) through col. (c))
Revenue	1 Gross receipts .....	20,449.	42,271.		62,720.
	2 Less: Contributions .....	4,000.	24,819.		28,819.
	3 Gross income (line 1 minus line 2) .....	16,449.	17,452.		33,901.
Direct Expenses	4 Cash prizes .....		2,697.		2,697.
	5 Noncash prizes .....				
	6 Rent/facility costs .....				
	7 Food and beverages .....				
	8 Entertainment .....				
	9 Other direct expenses .....	13,299.	38,611.		51,910.
	10 Direct expense summary. Add lines 4 through 9 in column (d) .....				54,607.
	11 Net income summary. Subtract line 10 from line 3, column (d) .....				-20,706.

**Part III Gaming.** Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

		(a) Bingo	(b) Pull tabs/instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming (add col. (a) through col. (c))
Revenue	1 Gross revenue .....				
	2 Cash prizes .....				
Direct Expenses	3 Noncash prizes .....				
	4 Rent/facility costs .....				
	5 Other direct expenses .....				
	6 Volunteer labor .....	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	<input type="checkbox"/> Yes _____ % <input type="checkbox"/> No	
	7 Direct expense summary. Add lines 2 through 5 in column (d) .....				
	8 Net gaming income summary. Subtract line 7 from line 1, column (d) .....				

9 Enter the state(s) in which the organization conducts gaming activities: \_\_\_\_\_

a Is the organization licensed to conduct gaming activities in each of these states? ☐ Yes ☐ No

b If "No," explain: \_\_\_\_\_

10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," explain: \_\_\_\_\_

- 11** Does the organization conduct gaming activities with nonmembers? ☐ Yes ☐ No
- 12** Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed to administer charitable gaming? ☐ Yes ☐ No
- 13** Indicate the percentage of gaming activity conducted in:
- |                                      |            |   |
|--------------------------------------|------------|---|
| <b>a</b> The organization's facility | <b>13a</b> | % |
| <b>b</b> An outside facility         | <b>13b</b> | % |
- 14** Enter the name and address of the person who prepares the organization's gaming/special events books and records:

Name \_\_\_\_\_

Address \_\_\_\_\_

- 15a** Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ Yes ☐ No

**b** If "Yes," enter the amount of gaming revenue received by the organization \$ \_\_\_\_\_ and the amount of gaming revenue retained by the third party \$ \_\_\_\_\_

**c** If "Yes," enter name and address of the third party:

Name \_\_\_\_\_

Address \_\_\_\_\_

- 16** Gaming manager information:

Name \_\_\_\_\_

Gaming manager compensation \$ \_\_\_\_\_

Description of services provided \_\_\_\_\_

☐ Director/officer ☐ Employee ☐ Independent contractor

- 17** Mandatory distributions:

**a** Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

**b** Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$ \_\_\_\_\_

**Part IV Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

<b>Part IV</b>	<b>Supplemental Information</b> <i>(continued)</i>
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[illegible]

SCHEDULE I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

**Grants and Other Assistance to Organizations,  
Governments, and Individuals in the United States**  
Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.  
Attach to Form 990.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number  
81-0536902

**Part I** General Information on Grants and Assistance

- 1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☐ Yes ☒ No
- 2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

**Part II** Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section (if applicable)	(d) Amount of cash grant	(e) Amount of noncash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of noncash assistance	(h) Purpose of grant or assistance
EXPLORATIONWORKS 995 CAROUSEL WAY HELENA, MT 59601	81-0541491		7,560.	0.			TO HELP NONPROFITS RECOVER FINANCIALLY FROM THE COVID PANDEMIC

- 2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table 1.
- 3 Enter total number of other organizations listed in the line 1 table

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule I (Form 990) 2023



**SCHEDULE O**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Supplemental Information to Form 990 or 990-EZ**

Complete to provide information for responses to specific questions on  
Form 990 or 990-EZ or to provide any additional information.  
Attach to Form 990 or Form 990-EZ.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2023**

Open to Public  
Inspection

Name of the organization

HELENA AREA COMMUNITY FOUNDATION

Employer identification number

81-0536902

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

COSTS TO BUILD ENDOWMENT FOR GRANTS, WHICH IS THE EXEMPT PURPOSE.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FINANCE COMMITTEE WILL REVIEW AND THEN THE FULL BOARD WILL RATIFY.

FORM 990, PART VI, SECTION B, LINE 12C:

THE ORGANIZATION REQUIRES ANNUAL CERTIFICATION. THE POLICY IS DISCUSSED IN  
DETAIL, ESPECIALLY DURING PERIODS OF GRANT FUNDING, WHEN MOST CONFLICTS  
ARISE.

FORM 990, PART VI, SECTION B, LINE 15A:

THE ORGANIZATION CONDUCTS ANNUAL EVALUATIONS OF ITS EXECUTIVE DIRECTOR,  
REVIEWS RELATED SALARY AND BENEFITS DATA FOR THE LOCAL NONPROFIT SECTOR,  
AND DETERMINES PAY AND BENEFIT CHANGES BETWEEN OCTOBER AND DECEMBER  
ANNUALLY.

FORM 990, PART VI, SECTION C, LINE 19:

THE ORGANIZATION POSTS ON THEIR WEBSITE ANNUALLY OR MAKES AVAILABLE UPON  
REQUEST.



2023 DEPRECIATION AND AMORTIZATION REPORT

FORM 990 PAGE 10

990

Asset No.	Description	Date Acquired	Method	Life	C o n v	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	APPLE DESKTOP	06/01/14	200DB	5.00		HY17	2,200.			1,100.	1,100.	1,100.		0.	1,100.
2	LAPTOP	10/23/17	SL	5.00		16	1,500.				1,500.	1,500.		0.	1,500.
3	IMAC 24"	02/09/23	SL	5.00		16	1,250.				1,250.			229.	229.
	* TOTAL 990 PAGE 10 DEPR						4,950.			1,100.	3,850.	2,600.		229.	2,829.
	CURRENT YEAR ACTIVITY														
	BEGINNING BALANCE						3,700.			1,100.	2,600.	2,600.			2,600.
	ACQUISITIONS						1,250.			0.	1,250.	0.			229.
	DISPOSITIONS/RETIRED						0.			0.	0.	0.			0.
	ENDING BALANCE						4,950.			1,100.	3,850.	2,600.			2,829.
	ENDING ACCUM DEPR											3,929.			
	ENDING BOOK VALUE											1,021.			

2023 DEPRECIATION AND AMORTIZATION REPORT

- CURRENT YEAR FEDERAL - HELENA AREA COMMUNITY FOUNDATION

Asset No.	Description	Date Acquired			Method	Life	Line No.	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	APPLE DESKTOP	06	01	14	200DB	5.00	17	2,200.		1,100.	1,100.	1,100.		0.
2	LAPTOP	10	23	17	SL	5.00	16	1,500.			1,500.	1,500.		0.
3	IMAC 24"	02	09	23	SL	5.00	16	1,250.			1,250.			229.
	* TOTAL 990 PAGE 10 DEPR							4,950.		1,100.	3,850.	2,600.		229.
	CURRENT YEAR ACTIVITY													
	BEGINNING BALANCE							3,700.		1,100.	2,600.	2,600.		
	ACQUISITIONS							1,250.		0.	1,250.	0.		
	DISPOSITIONS							0.		0.	0.	0.		
	ENDING BALANCE							4,950.		1,100.	3,850.	2,600.		



## Helena Area Community Foundation Board of Directors 2025

### **DarAnne Dunning, President**

Attorney, Drake Law Firm, PC  
Specializing in Estate Planning, Business  
Development, And Nonprofit Formation  
Chair: Executive, Development  
*Helena, MT*

### **Joyce Day, Vice President**

Cash Operations Supervisor III,  
Federal Reserve Bank  
Chair: Development  
*Helena, MT*

### **Mark Barry, Treasurer**

Retired Chief Financial Officer/VP Corporate  
Support  
Montana State Fund  
Chair: Finance  
*Helena, MT*

### **Jalena Johnson, Secretary**

Vice President, Regional Retail Manager,  
Opportunity Bank  
Chair: Events  
*Helena, MT*

### **Brian Nelson**

Fiscal Planner and Investment Manager,  
Sullivan Financial Group  
*Helena, MT*

### **John Moore**

Retired  
State of Montana Dept of Administration  
Chair: Community Connections  
*Helena, MT*

### **Tommy Williams**

Retired Senior Software Engineer,  
Mastery Logistics Systems  
*Helena, MT*

### **Michael Hale**

Accounting and Grants Manager,  
Montana Nonprofit Association  
*Helena, MT*

### **Wes Feist**

Business Operations Analyst,  
Montana Department of Administration  
City Council Member, City of East Helena  
*Helena, MT*

## List of Grant Selection Committee Members

## **Evaluation Committee Members:**

### **Chair:**

John Moore, HACF Board Member

### **Members:**

Colin Day, Community Member

Joyce Day, HACF Board Vice President

Wes Feist, HACF Board Member

Billie Miller, Community Member

Sumner Sharpe, Community Member

Tommy Williams, HACF Board Member

### **Facilitator:**

Emily Frazier, HACF Executive Director

# Application Review Materials, Evaluation Scoring

# 2025 Combined Grant Application

APPLICATION DEADLINE: March 7, 2025

The Helena Area Community Foundation (HACF) is pleased to announce our only planned grant cycle for 2025. Funding for 2025 totals \$67,750 and is provided by: HACF in the amount of \$25,000; Lewis and Clark County in the amount of \$23,750; and the City of Helena in the amount of \$19,000\*. This grant cycle opens on January 27, 2025 and closes on March 7, 2025. Awards will be finalized and announced on or before April 18, 2025.

## TRAINING OPPORTUNITY:

HACF will offer a grant writing course on February 20th at 11 a.m., which in part will review the criteria and evaluation of this grant cycle. Please register at <https://hacf.networkforgood.com/events/81366-grant-writing-workshop>

This training is free, but registration is required.

## GRANT INFORMATION:

Grants will be made between \$500 and \$4000 per nonprofit organization. Grants may be fulfilled from a combination of funding sources. Some of these sources have restrictions that others do not.

The 2025 City of Helena Fund will only be distributed to 501(c)(3) organizations in the greater Helena Area, with a priority given to organizations operating within the Helena city limits.

Lewis and Clark County Funds can be distributed to 501(c)(3) organizations in or outside of Helena, Lewis and Clark County, or in regions that serve residents of Lewis and Clark County. Funds must be used for projects with an expressed public purpose that benefit the residents of the City of Helena or the residents of Lewis and Clark County.

HACF Funds can be distributed to any regional 501(c)(3) organization.

Priorities will be given to nonprofits who demonstrate a meaningful, specific need that can be fulfilled with a small grant.

Please note, 'City of Helena' Funds may not be granted for projects that: i. Promote or advocate any political or religious belief; ii. Promote or solicit for:

a. purchase or use of tobacco products;



- b. purchase, use or consumption of alcoholic beverages;
- c. commercial transactions for pornography or sexually explicit goods or services;
- d. services involving avoidance or termination of pregnancy; and/or
- e. advocate violence or discrimination against individuals or groups

Organizations that house some projects that would not be eligible based on these criteria may still apply for projects that meet the above criteria.

Management and disbursement of public funds subjects this grant-making program to Montana's open meetings law. Be aware that any information you share in your application may be discussed publicly in an open meeting and be subject to public comment.

\*HACF receives a 5% administrative fee from the City of Helena and Lewis and Clark Counties in exchange for administering this program.

Questions? Please contact: Emily Frazier, HACF Executive Director 406-441-4955 or [emilyf@helenaareacommunityfoundation.org](mailto:emilyf@helenaareacommunityfoundation.org).

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\* Indicates required question

1. Email \*
2. Organization Name: \*
3. Name/Title of Contact Person: \*
4. Mailing/Physical Address: \*
5. City, State, and Zip Code \*
6. Does your organization's physical address reside within the Helena city limits? \*
7. Telephone: \*
8. Website: \*
9. What is your Organization's Mission? \*
10. Amount of Grant Requested (Maximum \$4000) \*
11. What measurable, meaningful need can a grant in the amount of \$500-\$4000 fulfill for your organization? Be specific, but brief.
12. How will a small grant help your organization progress? What outcomes do you \* expect from this grant? How can you measure the impact of fund usage?
13. In what way does this project benefit the residents of the City of Helena/Lewis and \* Clark County and/or the greater Helena community?

14. Brief Budget Narrative (limit 250 words). How will funds be used? Please be  
\* specific and include approximate amounts needed for each budget item.
15. Approximately how many clients would this project serve? \*
16. How many clients did your organization serve last year? \*
17. Does your organization track the percentage of low-to moderate income clients  
\* served?
18. If yes, what percentage of clients served are low-to-moderate income?\*

\*This information is not used for evaluation purposes.

\*Information on low-to-moderate income service is not part of the grant evaluation process. So why are we asking? HACF is exploring additional partnerships that in the future could result in opportunities for organizations eligible for Community Reinvestment Act funds.

19. Please upload a pdf of your organization's IRS Determination Letter

Files submitted:

FINANCIAL QUESTIONS: audited financials or full budget not required at this time.  
HACF may request additional information if necessary.

20. 501(c)(3) EIN Number \*
21. If you are a fiscally sponsored organization, what is the name of your fiscal sponsor?
22. Organization's Annual Budget Amount \*
23. I understand that a portion of the funds grant-making program are public funds, \* and are thereby subject to Montana's open meetings law. I understand that information I have shared in this application may be discussed publicly in open meetings and be subject to public comment.

#### REPORTING REQUIREMENTS:

A brief narrative describing stories, results, and expenditures will be required when funds are expended or by February 1, 2026

24. By entering my name, title, and date, I am signing as an authorized individual on  
\* behalf of my organization.

First Name, Last Name, Title, and Date

Questions? Please contact: Emily Frazier, Executive Director 406-441-4955 or  
[emilyf@helenareacommunityfoundation.org](mailto:emilyf@helenareacommunityfoundation.org)

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## Evaluation Criteria:

General: Application is complete (Yes / No)
Meaningful Grant: The project need is immediate in the community (Score 1-5)
Meaningful Grant: The application describes a measurable program or project. (Score 1-5)
Meaningful Grant: The project need is specific (Score 1-5)
Client Base: Grant project will serve an appropriate number of clients (Score 1-5)
Budget: A grant will provide a significant percentage of project budget (Score 1-5)
Budget: Projected budget is specific (Score 1-5)
Budget: Projected expenses are reasonable (Score 1-5)
(If applicable) Organization has demonstrated successful implementation of previous HACF grants (Yes / Partial / No) *

Organization	Evaluator 1	Evaluator 2	Evaluator 3	Evaluator 4	Evaluator 5	Evaluator 6	Evaluator 7	Evaluator 8	Average	Average without outliers	Median	Range	grant report from previous years	Amount Requested
Angel Fund	31	32	33	35	26	31	30	26	30.5	31	31	31	9 y	\$ 4,000.00
Archie Bray Foundation	31	28	26	32	26	28	16	27	26.75	27.25	27.5	27.5	16 na	\$ 3,963.00
Art Mobile of Montana	31	29	20	34	25	35	14	27	26.875	28	28	28	21 na	\$ 4,000.00
Aspen Adult Service, Inc	25	29	15	33	18	5	20	20	20.625	20.75	20	20	28 na	\$ 4,000.00
Beau Rangel Resilience Fund	26	27	33	30	22	29	27	20	26.75	27.25	27	27	13 na	\$ 4,000.00
Big Brothers Big Sisters of Central Montana	32	32	27	34	25	31	32	25	29.75	30.5	31.5	31.5	9 y	\$ 3,500.00
Capital High Theatre	30	29	22	35	24	34	26	23	27.875	27.25	27.5	27.5	13 y	\$ 3,000.00
Catholic Social Services of Montana	30	33	35	35	28	35	29	22	30.875	31.75	31.5	31.5	13 y	\$ 4,000.00
Clancy Elementary	31	31	32	32	26	29	31	22	29.25	30.5	31	31	10 na	\$ 2,350.00
Clay Arts Guild of Helena	25	31	23	30	23	32	31	18	26.625	27.25	27.5	27.5	14 na	\$ 3,250.00
Cohesion Dance Project, Inc	30	27	19	34	26	33	31	23	27.875	28.5	28.5	28.5	15 y	\$ 4,000.00
ExplorationWorks	32		13	35	21	33	30	26	27.1428571	29.3333333	30	30	22 y	\$ 3,995.00
Family Outreach Inc.	28	30	29		25	33	26	23	27.7142857	27.6666667	28	28	10 na	\$ 4,000.00
Family Promise of Greater Helena	24	33	21	29	21	28	20	21	24.625	23.5	22.5	22.5	13 y	\$ 4,000.00
Florence Crittenton Home and Services	27	35	31	35	30	34	28	30	31.25	31.25	30.5	30.5	8 y	\$ 3,812.00
Foundation for Montana History	30	31	23	31	21	35	26	26	27.875	28.25	28	28	14 na	\$ 3,000.00
Friendship Center	30	35	32	35	23	35	27	30	30.875	31.75	31	31	12 y	\$ 4,000.00
GFWC Helena Woman's Club	26	26	20	34	19	19	22	23	23.625	22.75	22.5	22.5	15 y	\$ 2,000.00
Girls Thrive	32	33	21	35	23	29	21	29	27.875	28.25	29	29	14 y	\$ 3,000.00
Grandstreet Theatre	33	32	30	34	24	27	21	23	28	28.25	28.5	28.5	13 late	\$ 4,000.00
Hands On Global/HARRT (Helena Area Refugee Resettlement Team)	29	35	23	32	25	32	32	30	29.75	30.75	31	31	12 y	\$ 4,000.00
Helena Area Friends of Pets (HAFOP)	27	32	23	33	20	25	28	28	27	27	27.5	27.5	13 y	\$ 3,000.00
Helena Christian School	31	16	15	27	23	35	26	24	24.625	25	25	25	20 na	\$ 4,000.00
Helena College Foundation	30	34	24	35	25	29	30	25	29	28.5	29.5	29.5	11 na	\$ 3,070.00
Helena Community Gardens	30	33	35	35	27	33	30	28	31.375	31.5	31.5	31.5	8 extension	\$ 4,000.00
Helena Food Share	32	35	29	34	27	35	33	33	32.25	33	33	33	8 y	\$ 2,000.00
Helena Indian Alliance	31	34	27	35	29	35	32	28	31.375	31.5	31.5	31.5	8 na	\$ 4,000.00
Helena Symphony	31	31	28	32	22	30	24	22	27.5	28.25	29	29	10 y	\$ 4,000.00
Helena Village Collective	32	28	15	30	30	31	24	26	27	28.5	29	29	17 na	\$ 4,000.00
Holter Museum of Art	33	33	21	31	21	29	34	23	28.125	29	30	30	13 y	\$ 4,000.00
Impact Montana	26	18	19	26	16	31	20	20	22	21.25	20	20	15 na	\$ 4,000.00
Ironhorse Consortium for Young Musicians (Ironhorse Youth Music)	32	32	11	32	23	29	17	19	24.375	25.75	26	26	21 y	\$ 4,000.00

Last Chance Curling Club	33	32	25	35	24	33	32	27	30.125	31	32	11 y	\$ 1,219.90
Lewis & Clark Humane Society	28	32	35	33	22	29	27	27	29.125	29	28.5	13 y	\$ 4,000.00
Lewis & Clark Literacy Council	31	33	15	35	20	33	30	25	27.75	29.75	30.5	20 y	\$ 3,000.00
Lewis and Clark 4-H Foundation	30	26	26	35	20	35	19	23	26.75	26.25	26	16 na	\$ 4,000.00
Lewis and Clark County Historical Society (LCCHS)	30	26	25	33	18	35	32	26	28.125	28.5	28	17 y	\$ 4,000.00
Life Houses, Inc.	32	35	29	33	25	33	33	24	30.5	31.75	32.5	11 y	\$ 4,000.00
Mending Waters Montana	33	34	31		25	33	30	27	30.4285714	31.3333333	31	9 y	\$ 600.00
Merlin CCC	26	24	12	35	25	35	30	25	26.5	26.5	25.5	23 na	\$ 4,000.00
Montana Budget & Policy Center	26	20	7	33	22	12	16	19	19.375	19.25	19.5	26 na	\$ 3,000.00
Montana Free Press	25	28	20	35	20	16	13	20	22.125	21.25	20	22 y	\$ 4,000.00
Montana Legal Services Association	29	33	35	35	30	35	33	28	32.25	32.75	33	7 na	\$ 4,000.00
Montana Living History Program	30	29	27	34	26	32	27	26	28.875	28.25	28	8 y	\$ 500.00
Montana Playwrights Network (MPN)	29	30	23	35	29	33	33	27	29.875	30.25	29.5	12 y	\$ 3,550.00
Montana Renewable Energy Association*, Helena													
Vigilante Runners, Resilient Helena. *=fiscal lead.	31	32	18	34	25	34	32	24	28.75	30	31.5	16 na	\$ 2,500.00
Mountain Health Gives	30	32	19	34	31	32	35	23	29.5	31.25	31.5	16 y	\$ 4,000.00
Myrna Loy	30	33	23	35	25	35	28	28	29.625	29.75	29	12 y	\$ 3,350.00
Plymouth Congregational Church - United Church of Christ, Helena	29	32	19	35	25	35	33	27	29.375	30.25	30.5	16 y	\$ 653.60
Preserve Montana	26	30	22	35	24	30	25	26	27.25	26.75	26	13 y	\$ 3,660.00
Rocking Tree Farm	31	26	19	33	25	32	17	27	26.25	27.25	26.5	16 na	\$ 1,800.00
Rocky Mountain Development Council, Inc.	26	33	35	35	23	20	28	25	28.125	28	27	15 y	\$ 4,000.00
Special Olympics Montana	32	30	31	34	26	35	23	31	30.25	31	31	12 na	\$ 3,432.00
St. Peter's Health Foundation	32	33	33	33	27	33	27	27	30.625	31.25	32.5	6 na	\$ 2,995.00
Treasure State Runners	31	34	25	35	26	16	32	25	28	28.5	28.5	19 y	\$ 3,700.00
Tri-County Firesafe Working Group	30	34	27	34	23	35	34	27	30.5	31.25	32	12 na	\$ 3,000.00
United Way of the Lewis and Clark Area	32	27	31	27	30	33	35	29	30.5	30.5	30.5	8 y	\$ 4,000.00
West Mont	32	34	31	33	28	32	32	27	31.125	31.75	32	7 y	\$ 2,300.00
Wild Montana	28	33	25	34	25	21	28	24	27.25	26.5	26.5	13 y	\$ 4,000.00
World Montana; Montana Center for International Visitors	26	28	29	33	22	24		23	26.4285714	26	26	11 na	\$ 1,000.00
YWCA Helena	28	30	29	33	23	18	26	25	26.5	27	27	15 y	\$ 4,000.00

means no response from evaluator

Total

TOTAL REQUESTS  
\$ 204,200.50

# 2025 Grant Eval Meeting

Meeting called to order April 8, 2025, 11:00am

Welcome by John Moore

- We will be reviewing 61 grant applications
- There will be an opportunity for public comment
- This committee makes a recommendation to the HACF board and they will make the final decision in a special session on April 15
  - There will be a public vote by the board

Introductions

- John Moore: chair of the community connections committee
- Sumner Sharpe
- Joyce Day
- Billie Miller
- Wes Feist
- Colin Day
- Emily Frazier
- Tommy Williams

Observers

- Kathy Marks – Rocky Mountain DC
- Sheri Cronk – Clancy Elementary teacher
- Gina Rowland – Clancy Elementary parent
- Christina Barbachand – Holter Museum
- Danielle Wineman – Grandstreet Theatre
- Jan Clinard – Plymouth Church
- Jenny Buddenberg – Preserve Montana
- Marisa Dias-Waian – Merlin CCC
- Jenny Andersen – Helena Village Collective
- Ellen Bush – HARRT and Hands On Global
- Alicia Pichette – Clay Arts Guild

Purpose of the meeting is to review the applications. We are working with combined funds:

- City
- County
- HACF
- Total available to be granted:
- Amount applied for:

Grant evaluation matrices were submitted by the review committee members and compiled by HACF staff

## Evaluation of the grants

### Summary of what the grants requested, by organization

Archie Bray- Education: supplies, maintenance, safety

Art Mobile of Montana- van maintenance, art supplies, travel

Aspen Adult Services- buy new vehicle (non-specific)

Beau Rangel Resilience Fund- vehicle modifications, adaptive equipment training

Big Brothers Big Sisters- create 5 new mentoring relationships

Capital High Theatre- travel costs to make production to GF high schools

Catholic Social Services of MT-diapers and wipes for Baby Boutique

Clancy Elementary School- tools to launch preschool math foundational program

Clay arts Guild- study feasibility of buying currently leased building

Cohesion Dancy Project- expand movement classes 3 preK-2<sup>nd</sup> / 3 Head start

Exploration Works- summer camp scholarships for 17

Family Outreach- Remodel, repair treatment area: walls, door

Family Promise- staff parenting classes, circle of security program

Florence Crittenton- appliances to complete kitchen; lots of stats

GFWC Helena Women's Club- one \$1K scholarship, personal care packets

Girls Thrive- years' worth of snacks plus staff time to buy

Grandstreet Theatre- stipends to housing hosts for summer actors



Hands on Global/HAART- HOWL camp, 4 kids 2 weeks; driver for 10 weeks

Helena Area Friends of Pets- spay and neuter up to 30 'unowned' cats

Helena Christian School- enhance STEAM program in school

Helena College Foundation- support firefighter academy

Helena Community Gardens- Waukesha Garden pathway project

Helena Food Share- containers for rescued food meals; portion of costs

Helena Indian Alliance- help community assistance program (items, passes)

Helena Symphony- Symphony under the stars services: fire, police, ASL intern, volunteer coord

Helena Village Collective- support family care tent, support groups for parents

Holter Museum of Art- scholarships (full and partial) summer camps

Impact Montana- physical and mental health care for 2 service members

Ironhorse Consortium- fee waivers, summer music camps, 25% granted

Last Chance Curling Club- buy 5 brooms, 5 broom heads, 2 hr. ice time

Lewis and Clark Humane Society- spay and neuter 2 clinics up to 50 animals

Lewis and Clark Literacy Council- support for field strips ESL adults: gift cards, meal, transit

Lewis and Clark 4H Foundation- financial assist for all 4H youth (3 events)

Lewis and Clark County Historical Society- scan old sewer connection books; budget mostly vol hr.

Life Houses- counseling: individuals/group 2 houses; training

Mending Waters Montana- materials for fly rod building, fly tying courses

Merlin CCC- art for transformation event 29k budget; stipends, marketing, curric

Montana Budget and Policy Center- project to update county-level maps: housing, childcare access

Rocking Tree Farm- 6month stipend for intern; start Farm Stand (care farm model)

Rocky Mountain Development Corp- continue meals on wheels while federal grants uncertain

Special Olympics Montana- provide 1100 lunches one day of state basketball tournament 11/2025

St. Peter's Health Foundation- Bike Rodeo Course Kit for bike rodeo; several community partners

The Angel Fund- buy blow up beds and bedding (10 @ 160), left over for clothing

Foundation for Montana History- radio advertising for Helena History Tours; 3 months on 2 stations

The Friendship Center- support service costs on 24/7 Crisis Line

Montana Living History Program- materials for 4 reusable stations, Living History Day> food preservation

The Myrna Loy- offset film rentals, performance fees Montana Indian Heritage Day

Treasure State Runners- offset costs Just for Helena of It race: durable supplies, infrastructure

Tri-County Fire safe working group- 20% of 10 min video on fire safety for tri-county area

United Way of Lewis and Clark Area- create interactive Snap app directory community resources + 22 months site

West Mont- buy 60 bales of soil for farm: increase produce, start CSA

Wild Montana- 4 trail stewardship projects with volunteers; 12,559 total

YWCA Helena- help finish exterior patio; safety cabling, child safety gate

## Evaluation Criteria

### 2025 Evaluation Criteria

General: Application is complete (Yes / No)

Meaningful Grant: The project need is immediate in the community (Score 1-5)

Meaningful Grant: The application describes a measurable program or project. (Score 1-5)

Meaningful Grant: The project need is specific (Score 1-5)

Client Base: Grant project will serve an appropriate number of clients (Score 1-5)

Budget: A grant will provide a significant percentage of project budget (Score 1-5)

Budget: Projected budget is specific (Score 1-5)

Budget: Projected expenses are reasonable (Score 1-5)

(If applicable) Organization has demonstrated successful implementation of previous HACF grants (Yes / Partial / No) \*

This criteria came out of a board discussion about whether we should focus grants on a particular area (housing, food security, etc), but the board decided that that wasn't feasible this year.

## Discussion

We consider the spreadsheet of the scores from the evaluators but note that that's not the be all end all.

The different evaluation criteria and explanations:

- Average
- Average without outliers
- Median
- Range: the spread on the scores (larger range indicates more disagreement)
- Grade

We chose to first consider the applications sorted by average. We could fully fund about the top third, but we may choose to split money

When doing this comparison: how close is the average to the average without the outliers and what is the range (which ones are controversial).

United Way: Question: Would the people who would have most use for an app actually have the ability to access it? (Generally we're assuming United Way would know what they needed)

We decided to just go through the top few of them

- Montana Legal Services:
  - Requested:
  - Would serve:
  - Note: this would serve multiple years
- Helena Food Share
  - Requested

- Would serve
- Helena Indian Alliance
  - Requested
    - Buy personal care items, gas cards, community assistance, bus passes
  - Would serve:
  - Note: this would double the number of people they serve
- Helena Community Gardens
  - Requested
  - Note: federal funding was stopped, this would allow them to continue
  - Last year's grant application was pulled up
- Florence Crittendon
  - Requested
    - Wanted to buy appliances for the residential area: freezer, fridge, small fridge for formula and breast milk
  - Question: we have had requests from them before for this, it could be because they're "stairstepping" and continuing fundraising and adding things as they go
  - Last year's application was pulled up
- Catholic Social Services
  - Baby boutique: their demand has doubled (and we expect it to grow further)
  - Helping them might take some strain off of other organizations, but also we don't want to ignore other things that enrich our community
- St Peter's Health Foundation
  - Requested: for bike races (bike safety program for kids)
  - Overall budget 17500, they've raised 14...., and they've asked for...
  - They expect about 100 kids to participate
  - Concern: the base budget
  - Mostly they look at health specific so when they're doing public outreach they feel the need to partner (they work with police departments and school districts who might be able to direct them to families in need)
  - These materials could be re-used in the future and this may support families that may not do this sort of thing otherwise
  - Childcare Connections used to do this sort of thing, but they've since closed
- United Way
  - Create an app with a directory to community resources
  - Create and long term support for the app

- Q: how are people even going to know that this app is out there? If the app doesn't get used, what's the benefit to the community?
  - Maybe not just clients using it, but possibly other agencies that might be able to direct THEIR clients
  - How do you bridge the gap between the app existing and people who need it?
  - Partial funding may not be effective in this case because if it can't be supported, it will fall apart, and then what was the point?
- How did they come to the conclusion that an app was the solution?
  - A printed directory immediately becomes out of date, but we would need to keep an app updated as well
- Tri county firesafe working group
  - High range on that
  - Video on fire safety (this would be \_\_% of the cost of putting together a 10 minute video)
    - They have some other resources, this was 20% of their budget but they had matching funds
  - They serve three counties
- Life Houses
  - Small number, but a lot of the people they serve are ones that fall through the cracks on other things
  - Possibly high impact
- Angel Fund
  - Request: they wanted to buy 10 inflatable queen beds and bedding for kids who are couch surfing and some clothes
  - This one might be reasonable to partially fund (\$1600 for just the beds)
  - They are a large budget org so even partial funding might allow them to close the gaps elsewhere
  - The budget here is less specific than others
- Mending Waters
  - Fly fishing materials for veterans
  - Serve about 30
  - Their overall budget is about \$25000, so the small grant amount goes a long way
  - They do a lot of things beyond what this grant specifically asks for
- Special olympics
  - State basketball tournament in november

- 735 athletes +coaches and volunteers
- This would provide lunches for one day of the tournament, \$3425
- Comment: this doesn't really seem to fit with the HACF purview, this is more statewide, even though the event is happening in Helena
  - Having the event here also has an economic impact on Helena
  - Is this more of a grant or more of a sponsorship (in the past we've requested to not be a sponsor of events; we tend to avoid entering that territory except when it's something very infrastructure based, eg MNA events in Helena. HACF doesn't buy tickets to events, and sponsorship benefits aren't something that we're in it for)
- Unclear what the overall budget is? If we don't fund this, where else would they get the budget from
- Maybe return to this, but we have concerns. Highlight it and come back
- Immediate need for the group, benefits the community, but not necessarily an immediate need FOR the community
- Last Chance Curling Club
  - Buy adaptive brooms and broom heads and rent the ice for senior events
    - This is something that is reusable
  - They have a match of \$400 for those events and it serves about 40 people
  - We've given grants in the past and they're always extremely well documented
  - Generally we were pretty impressed by this one
  - Immediate need for the group, benefits the community, but not necessarily an immediate need FOR the community
- Playwright's network
  - Projector
    - One time purchase, long term use
  - Immediate need for the group, benefits the community, but not necessarily an immediate need FOR the community
  - In previous years, we've funded this group at some level
  - Possibly we could provide funds for just the projector (\$2950)
  - Question: how did this come out higher in terms of score than Grandstreet or Capital High?
- Refugee resettlement
  - Request
  - Note: budget details didn't quite add up, possibly just slightly off
- Big Brothers Big Sisters

- Request funds to recruit and train 5 mentors in the central Montana area (which includes Helena)
- What are “operational expenses” (we don’t have a strict definition)
- Long term sustainable: they’ve asked for basically the same thing each year
- Question: are there kids in waiting that need mentors? How immediate is this? Impression: there’s always a waiting list of kids.
  - We’ve been funding this program year after year at the same level and possibly there are other needs that might be more cost effective (ie, help more than 5 people)
- Myrna Loy
  - Funding for a one time event for Montana Indian Heritage Day
  - They have in-kind donations
  - Project based on collaboration?
  - Is this (similar to the special olympics) too sponsorship-y
- Mountain Health Gives
  - Eye exams for low income
  - Does medicaid/other resources cover this? Can these resources not be used?
    - Possibly for kids who are missed by medicaid? But we have no confirmation of that.
    - Who is the optometrist who is doing this? (School nurse)
  - How urgent/immediate is this? (potentially lifechanging for those kids)
  - Many unanswered questions for this one
- Plymouth Congregational Church
  - Books/study guide about global warming to facilitate discussion
  - \$654
  - They’ve done other programs in the past and maybe this is “building on that success”
  - Community building, small and specific
- Clancy Elementary
  - Math Foundational skills for preschool
  - No federal or state preschool funds
  - Cost to launch \$150,000 (ish)
  - They’re asking for tools and resources to serve about 25 students
    - Reusable materials
  - This is a 5 year period, longer term trajectory, budget is lined out for the long term

- Humane Society
  - Spay/neuter/vaccinate two day clinic
  - Extremely specific application
  - We fund the same clinic year after year, what is the benefit to the community?
    - This is both for those already in the shelter and animals that community members bring in, but they don't break down how many of each
    - Possibly partial funding
- Helena College Foundation
  - Firefighter community education, not a college course
    - Wildland firefighters, but separate from the degree that the school has
  - Would serve 8 firefighter recruits
  - A new program, \$13000 overall budget, this would be about 23%
  - Students wouldn't qualify for federal aid
  - Small population served, but possibly a large impact
  - Some volunteer fire departments already provide funding
- Living History program
  - Living history day, gardening and food preservation
  - Educational, estimated 750 people served
    - But who are those people
  - Not clearly measurable
    - "need for these skills has grown dramatically"
      - But HOW and how do we know?
  - There have been similar events and there has been interest and this is a small ask
- Clay Arts Guild
  - Participants attend free of charge, the grant covers a large portion of the project
  - An "opportunity" to buy the existing building. Does the building NEED to be purchased?
  - Feasibility study
- Rocky Mountain Development Council
  - Because federal funding is in question
  - Application was maybe not well done



- Not sustainable for HACF to fund it year after year, but a lot of people rely on it
- Maybe things will change in a year and they won't need us long term
- Generally evaluators are very positive about the need and about funding the project, the concern is mostly about the application
- Treasure state runners
  - Big economic impact
  - Lots of volunteers
  - Does the event raise money for other things?
  - It's for swag, is that valuable? Give money for things to give away to raise money for other things?
  - Budget was strange
- Beau Rangel
  - They live in Cascade, not technically part of our reach area
  - Very specific, need for one person

## Public Comment

- Clay Arts Guild Rep
  - The word opportunity is misused. The current lease expires in 2028, but the building is for sale. A new owner would likely not give them the same rent or may not let them keep the space.
  - Without the building, they wouldn't be able to continue
  - They've looked for another location, but kilns are hard to keep in the city limits, their current kilns are grandfathered in, but they won't be able to have them in another place
  - Legal counsel assessments of the property, review of the property, and this is a match to what the members have put up
- Plymouth Cong
  - Previously held public events about homelessness, hundreds of people attended, did a sleeping bag drive for homeless people, 450 people involved
  - Helena Interfaith Climate Advocates are hosted by Plymouth
    - So they're looking at starting a series of 5 meetings
    - Community wide conversation
- Clancy Elementary
  - Board has committed money to starting the preschool

- Some kids go into MT City or Helena
- For the first year, you don't get federal funding, but after the first year you can get federal and state funding
- School has already committed about \$140000 for literacy, teacher salaries, etc
- This is just for manipulatives and tools
- \$2800 grant from the masons for science and drama
- There isn't really a preschool in Clancy, idea is that this is the "first educational experience"
  - Borderline age students
  - 24 families this year, but about the same number each year
- Grandstreet
  - 10 visiting artists from around the country who are in the shows but also teach during the summer courses
  - Some end up moving to Helena long term
  - They stay with Helena families and this helps to offset those costs
- Preserve Montana
  - Schoolhouse preservation center
  - Historic spaces, structures, and buildings around Montana
  - Workshops to teach community members how to do preservation and restoration
    - "who can help me preserve my historic property"
  - Economic and community benefits
    - Cultural identity and brings heritage tourism
  - If they don't get funding, they do have some sponsors and there is a small registration fee, but they need this to close the gaps
- Merlin CCC
  - Arts and humanities funding has been cut
  - Provides a platform
  - Civil discussion
  - What does it mean to live well
  - Rigorous open discussion of ideas
- Helena Village Collective
  - New organization!
- Holter
  - In support of the downtown district
  - Federal funding cuts, state hasn't been cut (yet)

- Grant funding at the Holter goes to support education programming
  - Summer camps, 16 camps in the past, 25 camps this summer
  - 450-500 kids over 10 weeks of programming
  - Unprecedented request for scholarships
  - Cooking, theater, clay, technology
- Funding for scholarships for families who can't afford to attend

## Returning to discuss funding amounts

- Table special olympics, playwrights, curling
- Literacy Council
  - Unclear how to measure if it was having an impact
- What are the materials that they are purchasing?
- Florence Crittendon
  - Examined application from last year, the ask is for the same appliances
  - Half funding last year
  - Are we paying for the same things as for last year?
    - Last year they got a commercial dishwasher
  - They're doing a large project piece by piece
  - They're specific about which appliances
- Helena Community Gardens
  - They're asking for things for the same garden, but we didn't fully fund it last year
  - It does seem to be a duplicate and we don't have a full report from them (they were granted an extension)
  - Funding removed
- Helena College Foundation
  - Note, the supplies are temporary
- Holter
  - Partial funding
- Grandstreet
  - Partial funding
- Treasure state runners
  - Passthrough to other orgs, no funding
- Girls Thrive
  - Snacks, basically the same as last year

- Are those program necessities?
- Foundation for Montana History
  - Wanted advertising money for something that people pay to do
  - No funding
- Capital High
  - Traveling up to Great Falls, support for Helena students
- Cohesion Dance
  - More movement classes for kids and through head start
  - Partial funding?
  - Expenses were somewhat vague (instructor expenses?)
- Literacy Council
  - They need to provide more specifics
- Family Outreach
  - Physical improvements
  - Will this continue over and over? Long term need?
- Helena Symphony
  - Symphony under the stars safety
- Wild Montana
  - The salary is large, should we be contributing to that
  - Program materials vs materials
- Preserve Montana
  - Preservation workshops
  - Is it an immediate need?
- Exploration Works
  - Scholarships like with the Holter
  - Lack of specifics for the benefit
  - Helena specific rather than the wider area
  - Cost per person is high
    - What does that cost go to? Unclear in the budget
  - Number of people served is somewhat unclear, but it does serve low income kids and it's the only way kids can attend
- Merlin CCC
  - Community discussion "the transformative power of art"
- Clay Arts
  - If buying the building doesn't come through, where does this money go
  - But doing nothing does have an impact because they would just go away
  -

- Helena Village
  - Seems duplicative of HIA and Florence Crittendon
  - Family care tent at local events
  - What do they actually do
  - They don't track who comes through their doors (get an estimate of number of clients served, you don't have to track names)
- L&C 4h
  - Somewhat nonspecific, a weak application
- Archie Bray
  - Materials and maintenance (very specific, perhaps not immediate)
- YWCA
  - Budget funding incomplete/unclear
  - Should the safety issue been addressed already?
    - Did they not have enough to finish it before and they need this to finish it
  - Unclear what the need was
- Family Promise
  - Staffing parenting classes
  - Have some granted funds
  - Budget very nonspecific
  - Circle of security? What is that?

## More public content, based on the discussion

Opened the floor for comment. Requests for advice going forward. Emily is available for grant writing mentoring and other fundraising sources.

## Closing

City and County money has limits for who it can go to, Emily will look at how to split up the money.

In the future, we should be clear that money doesn't have to be spent in the city itself

Thank you to everyone! Meeting closed at 2:57pm

Organization	Average	Average without outliers	Median	Range	grant report from previous years	Amount Requested	Total Funding Recommendation	from HACF	From City of Helena	From County
Angel Fund	30.5	31	31		9 y	\$ 4,000.00	\$ 1,600.00		\$ 1,600.00	
Catholic Social Services of Montana	30.875	31.75	31.5		13 y	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00		\$ 2,000.00
Clancy Elementary	29.25	30.5	31		10 na	\$ 2,350.00	\$ 2,350.00	\$ 350.00		\$ 2,000.00
Cohesion Dance Project, Inc	27.875	28.5	28.5		15 y	\$ 4,000.00	\$ 1,000.00		\$ 1,000.00	
ExplorationWorks	27.1428571	29.3333333	30		22 y	\$ 3,995.00	\$ 2,000.00		\$ 2,000.00	
Florence Crittenton Home and Services	31.25	31.25	30.5		8 y	\$ 3,812.00	\$ 3,812.00	\$ 1,812.00		\$ 2,000.00
Friendship Center	30.875	31.75	31		12 y	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00	\$ 2,000.00	
Grandstreet Theatre	28	28.25	28.5		13 late	\$ 4,000.00	\$ 2,000.00	\$ 1,000.00	\$ 1,000.00	
Hands On Global/HARRT (Helena Area Refugee Resettlement Team)	29.75	30.75	31		12 y	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00		\$ 2,000.00
Helena Food Share	32.25	33	33		8 y	\$ 2,000.00	\$ 2,000.00	\$ 1,000.00	\$ 1,000.00	
Helena Indian Alliance	31.375	31.5	31.5		8 na	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00		\$ 2,000.00
Helena Symphony	27.5	28.25	29		10 y	\$ 4,000.00	\$ 1,000.00	\$ 500.00	\$ 500.00	
Holter Museum of Art	28.125	29	30		13 y	\$ 4,000.00	\$ 2,000.00	\$ 1,000.00	\$ 1,000.00	
Last Chance Curling Club	30.125	31	32		11 y	\$ 1,219.90	\$ 1,220.00			\$ 1,220.00
Lewis & Clark Humane Society	29.125	29	28.5		13 y	\$ 4,000.00	\$ 2,000.00	\$ 1,000.00	\$ 1,000.00	
Life Houses, Inc.	30.5	31.75	32.5		11 y	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00		\$ 2,000.00
MendingWaters Montana	30.4285714	31.3333333	31		9 y	\$ 600.00	\$ 600.00	\$ 40.00		\$ 560.00
Montana Legal Services Association	32.25	32.75	33		7 na	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00		\$ 2,000.00
Montana Living History Program	28.875	28.25	28		8 y	\$ 500.00	\$ 500.00			\$ 500.00
Myrna Loy	29.625	29.75	29		12 y	\$ 3,350.00	\$ 3,350.00	\$ 1,350.00	\$ 2,000.00	
Plymouth Congregational Church - United Church of Christ, Helena	29.375	30.25	30.5		16 y	\$ 653.60	\$ 653.00	\$ 153.00	\$ 500.00	
Rocky Mountain Development Council, Inc.	28.125	28	27		15 y	\$ 4,000.00	\$ 2,000.00			\$ 2,000.00
St. Peter's Health Foundation	30.625	31.25	32.5		6 na	\$ 2,995.00	\$ 2,995.00	\$ 995.00	\$ 2,000.00	
Tri-County Firesafe Working Group	30.5	31.25	32		12 na	\$ 3,000.00	\$ 3,000.00	\$ 1,000.00		\$ 2,000.00
United Way of the Lewis and Clark Area	30.5	30.5	30.5		8 y	\$ 4,000.00	\$ 4,000.00	\$ 2,000.00	\$ 2,000.00	
West Mont	31.125	31.75	32		7 y	\$ 2,300.00	\$ 2,300.00	\$ 300.00		\$ 2,000.00
Wild Montana	27.25	26.5	26.5		13 y	\$ 4,000.00	\$ 1,470.00			\$ 1,470.00
YWCA Helena	26.5	27	27		15 y	\$ 4,000.00	\$ 1,900.00	\$ 500.00	\$ 1,400.00	
Archie Bray Foundation	26.75	27.25	27.5		16 na	\$ 3,963.00				
Art Mobile of Montana	26.875	28	28		21 na	\$ 4,000.00				
Aspen Adult Service, Inc	20.625	20.75	20		28 na	\$ 4,000.00				
Beau Rangel Resilience Fund	26.75	27.25	27		13 na	\$ 4,000.00				
Big Brothers Big Sisters of Central Montana	29.75	30.5	31.5		9 y	\$ 3,500.00				
Capital High Theatre	27.875	27.25	27.5		13 y	\$ 3,000.00				
Clay Arts Guild of Helena	26.625	27.25	27.5		14 na	\$ 3,250.00				
Family Outreach Inc.	27.7142857	27.6666667	28		10 na	\$ 4,000.00				
Family Promise of Greater Helena	24.625	23.5	22.5		13 y	\$ 4,000.00				
Foundation for Montana History	27.875	28.25	28		14 na	\$ 3,000.00				

GFWC Helena Woman's Club	23.625	22.75	22.5	15 y	\$ 2,000.00				
Girls Thrive	27.875	28.25	29	14 y	\$ 3,000.00				
Helena Area Friends of Pets (HAFOP)	27	27	27.5	13 y	\$ 3,000.00				
Helena Christian School	24.625	25	25	20 na	\$ 4,000.00				
Helena College Foundation	29	28.5	29.5	11 na	\$ 3,070.00				
Helena Community Gardens	31.375	31.5	31.5	8 extension	\$ 4,000.00				
Helena Village Collective	27	28.5	29	17 na	\$ 4,000.00				
Impact Montana	22	21.25	20	15 na	\$ 4,000.00				
Ironhorse Consortium for Young Musicians (Ironhorse Youth Music)	24.375	25.75	26	21 y	\$ 4,000.00				
Lewis & Clark Literacy Council	27.75	29.75	30.5	20 y	\$ 3,000.00				
Lewis and Clark 4-H Foundation	26.75	26.25	26	16 na	\$ 4,000.00				
Lewis and Clark County Historical Society (LCCHS)	28.125	28.5	28	17 y	\$ 4,000.00				
Merlin CCC	26.5	26.5	25.5	23 na	\$ 4,000.00				
Montana Budget & Policy Center	19.375	19.25	19.5	26 na	\$ 3,000.00				
Montana Free Press	22.125	21.25	20	22 y	\$ 4,000.00				
Montana Playwrights Network (MPN)	29.875	30.25	29.5	12 y	\$ 3,550.00				
Montana Renewable Energy Association*, Helena Vigilante Runners, Resilient Helena. *=fiscal lead.	28.75	30	31.5	16 na	\$ 2,500.00				
Mountain Health Gives	29.5	31.25	31.5	16 y	\$ 4,000.00				
Preserve Montana	27.25	26.75	26	13 y	\$ 3,660.00				
RockingTree Farm	26.25	27.25	26.5	16 na	\$ 1,800.00				
Special Olympics Montana	30.25	31	31	12 na	\$ 3,432.00				
Treasure State Runners	28	28.5	28.5	19 y	\$ 3,700.00				
World Montana; Montana Center for International Visitors	26.4285714	26	26	11 na	\$ 1,000.00				
Total					Requested	Granted	HACF	City	County
					\$ 204,200.50	\$ 67,750.00	\$ 25,000.00	\$ 19,000.00	\$ 23,750.00

# HACF Board Special Session for Grant Ratification

April 15, 2025

Meeting called to order at 5:06pm

## Introduction

Hello, HACF Board and members of the public. Thank you for joining us at this special session of the HACF board for the review and ratification of grant recommendations. I am DarAnne Dunning, board president of the Helena Area Community Foundation.

Present:

- Members of the Board
  - DarAnne Dunning
  - John Moore
  - Mark Barry
  - Michael Hale
  - Brian Nelson
  - Wes Feist
  - Joyce Day
- Emily Frazier, HACF Executive Director
- Meredith Sargent, HACF Operations Manager
- Observers
  - Neil Sauter, Last Chance Curling Club

A quorum of board members is present.

The current cycle of grants is composed of \$25,000 from the Helena Area Community Foundation, \$19,000 from the City of Helena, and \$23,750 from Lewis and Clark County.

Because this grant cycle has been funded by public entities, this meeting is open to the public, and there will be time set aside for public comment prior to the board taking action.

We ask all members of the public to please mute their microphones until we reach the period for public comment. At that time, please indicate your interest in speaking by either raising your hand, typing in the chat, or taking yourself off mute. Please keep your comments brief.



With that, I'd like to turn the floor over to John Moore, the chair of the Community Connections Committee, to share information on the process of the cycle and evaluation, and then to share the funding recommendations made by the evaluation committee in a public meeting on Tuesday, April 8th.

## Review of Process and Funding Recommendations

Grant cycle opened

61 applications, total request was for

We had \$ to grant

CCC and members of the public evaluated the applications and turned their matrices into the staff at HACF who compiled those.

There was a four hour meeting on April 8 and these are the grants the committee proposed.

Organization	Amount Requested	Total Funding Recommendation
Angel Fund	\$4,000.00	\$1,600.00
Catholic Social Services of Montana	\$4,000.00	\$4,000.00
Clancy Elementary	\$2,350.00	\$2,350.00
Cohesion Dance Project, Inc	\$4,000.00	\$1,000.00
ExplorationWorks	\$3,995.00	\$2,000.00
Florence Crittenton Home and Services	\$3,812.00	\$3,812.00
Friendship Center	\$4,000.00	\$4,000.00
Grandstreet Theatre	\$4,000.00	\$2,000.00
Hands On Global/HARRT (Helena Area Refugee Resettlement Team)	\$4,000.00	\$4,000.00
Helena Food Share	\$2,000.00	\$2,000.00
Helena Indian Alliance	\$4,000.00	\$4,000.00
Helena Symphony	\$4,000.00	\$1,000.00
Holter Museum of Art	\$4,000.00	\$2,000.00
Last Chance Curling Club	\$1,219.90	\$1,220.00
Lewis & Clark Humane Society	\$4,000.00	\$2,000.00
Life Houses, Inc.	\$4,000.00	\$4,000.00
Mending Waters Montana	\$600.00	\$600.00

Montana Legal Services Association	\$4,000.00	\$4,000.00
Montana Living History Program	\$500.00	\$500.00
Myrna Loy	\$3,350.00	\$3,350.00
Plymouth Congregational Church - United Church of Christ, Helena	\$653.60	\$653.00
Rocky Mountain Development Council, Inc.	\$4,000.00	\$2,000.00
St. Peter's Health Foundation	\$2,995.00	\$2,995.00
Tri-County Firesafe Working Group	\$3,000.00	\$3,000.00
United Way of the Lewis and Clark Area	\$4,000.00	\$4,000.00
West Mont	\$2,300.00	\$2,300.00
Wild Montana	\$4,000.00	\$1,470.00
YWCA Helena	\$4,000.00	\$1,900.00

Short description of the requests:

## Questions from the board

1. We asked to review the requests that were not granted; here is a summary of that.
  - Archie Bray- Education: supplies, maintenance, safety
  - Art Mobile of Montana- van maintenance, art supplies, travel
  - Aspen Adult Services- buy new vehicle (non-specific)
  - Beau Rangel Resilience Fund- vehicle modifications, adaptive equipment training
  - Big Brothers Big Sisters- create 5 new mentoring relationships
  - Capital High Theatre- travel costs to make production to GF high schools
  - Clay arts Guild- study feasibility of buying currently leased building
  - Family Outreach- Remodel, repair treatment area: walls, door
  - Family Promise- staff parenting classes, circle of security program
  - GFWC Helena Women's Club- one \$1K scholarship, personal care packets
  - Girls Thrive- years' worth of snacks plus staff time to buy
  - Helena Area Friends of Pets- spay and neuter up to 30 'unowned' cats
  - Helena Christian School- enhance STEAM program in school
  - Helena College Foundation- support firefighter academy
  - Helena Community Gardens- Waukesha Garden pathway project

- Helena Village Collective- support family care tent, support groups for parents
- Impact Montana- physical and mental health care for 2 service members
- Ironhorse Consortium- fee waivers, summer music camps, 25% granted
- Lewis and Clark Literacy Council- support for field strips ESL adults: gift cards, meal, transit
- Lewis and Clark 4H Foundation- financial assist for all 4H youth (3 events)
- Lewis and Clark County Historical Society- scan old sewer connection books; budget mostly vol hr.
- Merlin CCC- art for transformation event 29k budget; stipends, marketing, curriculum
- Montana Budget and Policy Center- project to update county-level maps: housing, childcare access
- Rocking Tree Farm- 6month stipend for intern; start Farm Stand (care farm model)
- Special Olympics Montana- provide 1100 lunches one day of state basketball tournament 11/2025
- Foundation for Montana History- radio advertising for Helena History Tours; 3 months on 2 stations
- Treasure State Runners- offset costs Just for Helena of It race: durable supplies, infrastructure

## Public Comment

DarAnne: Before we take action, we will open the floor for public comment. If you'd like to make a comment, please indicate your interest in speaking by either raising your hand, typing in the chat, or taking yourself off mute. Please keep your comments brief.

No public comments offered.

## Board Action

At this point, I ask the HACF board if you are ready to take action on recommendations made by the evaluation committee.

Wes moves to approve the recommendations, Joyce seconds. All present vote in favor, the recommendations are approved

Thank you to the committee for their review, it looks like there are a lot of great projects in the community, we hope to expand our grant work in the future.

Thank you all for attending!

Meeting adjourned 5:25pm

<b>Total to Grant</b>		<b>\$ 67,750.00</b>	<b>\$ 25,000.00</b>	<b>\$ 19,000.00</b>	<b>\$ 23,750.00</b>
	<b>Amount</b>	<b>Total Funding</b>			
<b>Organization Name:</b>	<b>Requested</b>	<b>Recommendation</b>	<b>From HACF</b>	<b>From City of Helena</b>	<b>From County</b>
Angel Fund	\$ 4,000.00	\$ 1,600.00		\$1,600.00	
Catholic Social Services of Montana	\$ 4,000.00	\$ 4,000.00	\$2,000.00		\$2,000.00
Clancy Elementary	\$ 2,350.00	\$ 2,350.00	\$350.00		\$2,000.00
Cohesion Dance Project, Inc	\$ 4,000.00	\$ 1,000.00		\$1,000.00	
ExplorationWorks	\$ 3,995.00	\$ 2,000.00		\$2,000.00	
Florence Crittenton Home and Services	\$ 3,812.00	\$ 3,812.00	\$1,812.00		\$2,000.00
Friendship Center	\$ 4,000.00	\$ 4,000.00	\$2,000.00	\$2,000.00	
Grandstreet Theatre	\$ 4,000.00	\$ 2,000.00	\$1,000.00	\$1,000.00	
Hands On Global/HARRT (Helena Area Refugee I	\$ 4,000.00	\$ 4,000.00	\$2,000.00		\$2,000.00
Helena Food Share	\$ 2,000.00	\$ 2,000.00	\$1,000.00	\$1,000.00	
Helena Indian Alliance	\$ 4,000.00	\$ 4,000.00	\$2,000.00		\$2,000.00
Helena Symphony	\$ 4,000.00	\$ 1,000.00	\$500.00	\$500.00	
Holter Museum of Art	\$ 4,000.00	\$ 2,000.00	\$1,000.00	\$1,000.00	
Last Chance Curling Club	\$ 1,219.90	\$ 1,220.00			\$1,220.00
Lewis & Clark Humane Society	\$ 4,000.00	\$ 2,000.00	\$1,000.00	\$1,000.00	
Life Houses, Inc.	\$ 4,000.00	\$ 4,000.00	\$2,000.00		\$2,000.00
Mending Waters Montana	\$ 600.00	\$ 600.00	\$40.00		\$560.00
Montana Legal Services Association	\$ 4,000.00	\$ 4,000.00	\$2,000.00		\$2,000.00
Montana Living History Program	\$ 500.00	\$ 500.00			\$500.00
Myrna Loy	\$ 3,350.00	\$ 3,350.00	\$1,350.00	\$2,000.00	
Plymouth Congregational Church - United Chur	\$ 653.60	\$ 653.00	\$153.00	\$500.00	
Rocky Mountain Development Council, Inc.	\$ 4,000.00	\$ 2,000.00			\$2,000.00
St. Peter's Health Foundation	\$ 2,995.00	\$ 2,995.00	\$995.00	\$2,000.00	
Tri-County Firesafe Working Group	\$ 3,000.00	\$ 3,000.00	\$1,000.00		\$2,000.00
United Way of the Lewis and Clark Area	\$ 4,000.00	\$ 4,000.00	\$2,000.00	\$2,000.00	
West Mont	\$ 2,300.00	\$ 2,300.00	\$300.00		\$2,000.00
Wild Montana	\$ 4,000.00	\$ 1,470.00			\$1,470.00
YWCA Helena	\$ 4,000.00	\$ 1,900.00	\$500.00	\$1,400.00	

## List of Grant Recipients

## List of Grant Recipients

The Angel Fund: \$1,600  
Cohesion Dance Project: \$1,000  
Exploration Works: \$2,000  
Friendship Center: \$2,000  
Grandstreet Theatre: \$1,000  
Helena Food Share: \$1,000  
Helena Symphony: \$500  
Holter Museum of Art: \$1,000  
Lewis and Clark Humane Society: \$1,000  
Myrna Loy: \$2,000  
Plymouth Congregational Church: \$500  
St. Peter's Health Foundation: \$2,000  
United Way of the Lewis and Clark Area: \$2,000  
Wild Montana: \$1,400

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**Total City of Helena Grants Awarded: \$19,000**

## Grant Recipient Data



# The Angel Fund

EIN Number: 81-0535130

Marcia K. Wall, Founder/Donor & Grant Development

PO Box 7436

Helena, MT 59604

Email: [marciawall16@gmail.com](mailto:marciawall16@gmail.com)

Telephone: 406-439-1672

## **Total Grant Amount: \$1,600**

Total Amount Requested: \$4,000

Funding from City: \$1,600

Funding from HACF: \$0

**Organization's Mission:** Angel Fund is a nonprofit 501(c)(3) Corporation helping Helena School children with school items including clothing, shoes, school supplies, backpacks, classroom materials, field trip fees, and other required items to be successful in the classroom. We also award Montana post-secondary scholarships to qualified graduates at Access to Success, CHS, HHS, PAL, and EHHS based on financial need, academic success, and a commitment to "pay it forward" in the future.

**Description of Project or Program Receiving Funds:** Presently, elementary, middle/high school children receive a backpack full of supplies and school clothes to begin school each fall. As of February 26, 2025, the Helena School District has 364 Homeless children who need additional items to stay in school and be safe and successful. We need to help purchase blow-up beds and proper bedding. There have been 6-10 requests for these additional items. We have 278 McKinney Vento students, 59 children in foster/kinship care, 17 living in group homes, and 10 unaccompanied youth. If students need more than what is allocated by Angel Fund, we want to say "Yes, we can do that." Angel Fund holds many fundraisers throughout the year, so we never have to say "No" to a request or need. Your grant will help Angel Fund give more to our most vulnerable population and help fund the 1400 students qualifying for free/reduced lunch status with clothing, shoes, winter outerwear, school supplies, and other required items to be successful in school.

**Intended Use of Funds:** Every dollar makes a difference to Angel Fund! If a student receives clothing, shoes, and a backpack full of supplies, our homeless children may also need a bed. If that is the case, we do everything possible to encourage them to "never give up" and will help with those extra expenses; staying in school towards graduation will bring a brighter future and a way out of poverty. The outcome will be our projection of 1,400 students for the school year 25-26 will have a higher clothing allowance, shoes, a backpack, and shiny new school supplies to begin

another school year this fall. Additionally, our homeless students will receive a little more. Our scholarships do not require a certain GPA, so many students can apply to a technical school, and the scholarship award is enough to pay for their tuition. Each year, our School Counselors encourage our homeless kids to apply for an Angel Fund Scholarship! It's a celebration when we can continue helping a student beyond high school! We also help our Native American population. This Nonprofit has gone beyond my expectations, and I couldn't be more proud of the work we've accomplished together. Thank you to our wonderful Community for believing in our mission! To measure our impact ~ all Angel Coordinators at each Helena Public School sends copies of all applications with receipts to Janet Riis with a total of dollars spent for each student applying at the end of the calendar year.

**Brief Budget Summary:** We help approximately 1400 students each year with clothing, shoes, and school supplies. There are 364 students that are considered homeless in a different way and need more resources. The request for beds/bedding is from Michelle Zentz, who coordinates the needs for our kiddos in the District. Each queen blow-up bed costs approximately \$100, and proper bedding is about \$60. If you multiply (10) beds \$100 + (10) sets of bedding \$160 = \$1,600 plus the extra school clothing we allow these children to have, your grant will give us that extra revenue and helps with clothing and other required school items. Elementary children receive up to \$150, and middle/high school students receive \$200. We also encourage our homeless graduates to apply for an Angel Fund scholarship to help them beyond high school. To date, we have spent \$235,211 for clothing, shoes, winter outerwear, school supplies ("Stuff the Bus"), and scholarships for 1400 students just this school year. If we purchase beds/bedding, we don't want that amount to be a part of their individual allotment. Every dollar raised and granted is spent for our children in need each year.

**Expressed Public Benefit to the Residents of Helena:** When some of our students are hanging by a thread and Angel Fund steps in to pay for a pair of welding gloves, or new school clothes; that student is forever changed by someone they have never met, who wants to help them succeed and have a better life! That community spirit makes all the difference. Remember when you were a little kid and two captains were chosen so they could choose their teammates? Self-esteem at it's highest to be chosen first or second? Or, coming to school in a new outfit and twirling around so the Angel Coordinator can see their new clothes! Little kiddos love new school supplies so they look like their neighbor sitting next to them comparing their pencil boxes. When your Community takes care of our youth, they in turn take care of our future.



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248205449  
June 16, 2010 LTR 4168C EO  
81-0535130 000000 00

00028161  
BODC: TE

THE ANGEL FUND  
% MARCIA K WALL  
PO BOX 7436  
HELENA MT 59604-7436

Employer Identification Number: 81-0535130  
Person to Contact: Kim Chambers  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your June 07, 2010, request for information regarding your tax-exempt status.

Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in September 2000.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Beginning with the organization's sixth taxable year and all succeeding years, it must meet one of the public support tests under section 170(b)(1)(A)(vi) or section 509(a)(2) as reported on Schedule A of the Form 990. If your organization does not meet the public support test for two consecutive years, it is required to file Form 990-PF, Return of Private Foundation, for the second tax year that the organization failed to meet the support test and will be reclassified as a private foundation.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

0248205449  
June 16, 2010 LTR 4168C E0  
81-0535130 000000 00  
00028162

THE ANGEL FUND  
% MARCIA K WALL  
PO BOX 7436  
HELENA MT 59604-7436

Sincerely yours,

*Michele M. Sullivan*

Michele M. Sullivan, Oper. Mgr.  
Accounts Management Operations I

# Catholic Social Services of Montana

EIN Number: 81-0245570

Scott Held, Executive Director

PO Box 907

Helena, MT 59624

Email: [scott@cssmt.org](mailto:scott@cssmt.org)

Telephone: 406-442-4130

## **Total Grant Amount: \$4,000**

Total Grant Requested: \$4,000

Funding from City: \$0

Funding From County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** Based on our commitment to Catholic social teaching, Catholic Social Services of Montana (CSSM) provides for works of advocacy, compassion, pastoral outreach, education, and social justice.

**Description of Project or Program Receiving Funds:** Funding of a grant to CSSM will be utilized to directly benefit the purchase of diapers and wipes to support the ministry of the CSSM Baby Boutique, located in the administrative offices of the Cathedral of St Helena. The Baby Boutique provides basic needs assistance for families with young children in need by distributing purchased and donated diapers, wipes, rash cream, clothing, toiletries, and other necessities.

**Intended Use of Funds:** Over the past two years, client contact and demand has increased by 500% for this "no barriers" service. A small grant will allow relief for shortcomings in donations that arise due to the incredible need for the Baby Boutique's services, which is evidenced by the growth and continued client patronage of the service. Generosity and donations from the community are frequent, but demand often leads to a shortage of certain items and sizes. With this funding, we anticipate being able to increase capacity to meet the needs of Helena-area families who utilize this service to get through a difficult time or financial shortcoming. By supporting these basic needs, the Boutique provides relief for families who are often struggling emotionally and financially. Measuring the impact of fund usage for this program is simple, as CSSM volunteers track the number of client contacts and items distributed. These contacts can be directly applied to the funding, as there are specific measurables that can be directly tied to distributions, such as numbers of diapers and wipe packs. For example, diapers bought in bulk often cost \$0.18 per diaper, so a dozen diapers given to a client equal \$2.16 in funding that was utilized for that client. On a larger scale, a funding request of \$3,600 (please see the budget below) for diapers means approximately 20,000 diapers could be purchased to support the basic needs of families in the Helena-area.

**Brief Budget Summary:** The funds will be utilized to directly benefit the purchase of diapers and wipes. Of the \$4,000 requested, \$3,600 will be used to purchase diapers (approximately 20,000 diapers). \$400 will be used to purchase wipes (approximately 170 packages or 17,000 wipes). As the Boutique is already highly utilized by clients and social workers representing clients, and the service is primarily staffed by volunteers, there are no advertising or staff costs to be considered in this funding request. Every dollar will be used to support the basic needs items that will be distributed to families in need.

**Expressed Public Benefit to the Residents of Helena:** This project directly supports families with young children in need in the Helena-area. In calendar year 2024, 65,772 diapers, 1,552 packages of wipes (155,200 individual wipes), and 9,087 articles of clothing were distributed to families. This included a single month where strict limitations were placed on distributions due to shortcomings in supply. This averages to approximately 130 client encounters per month within the normal 16 hours per month the Boutique is open. Those 130 client encounters, multiplied by the national average of 3.15 household members per family, means approximately 410 individuals in the Helena-area are being served per month. Some clients are repeat users of services, but clients frequently utilize the Boutique's services not to completely supply their family needs (which wouldn't be effective due to the limitations of products given per child), but to supplement their family in a time of need, such as a financial shortfall between paychecks. With the distributions from the Boutique, these families experience relief from their stress knowing they will be able to take care of their child(ren) during these stressful times and because of the "store" style set-up of the Boutique, experience dignity in a time when they may feel ashamed because of the situation they find themselves in.

**Internal Revenue Service**

**Date:** March 26, 2007

CATHOLIC SOCIAL SERVICES FOR MONTANA INC  
PO BOX 907  
HELENA MT 59624-0907

**Department of the Treasury**  
**P. O. Box 2508**  
**Cincinnati, OH 45201**

**Person to Contact:**  
Ms. Gambone 31-08673  
Customer Service Representative  
**Toll Free Telephone Number:**  
877-829-5500  
**Federal Identification Number:**  
81-0245570  
**Group Exemption Number:**  
0928

Dear Madam:

This is in response to your request of March 26, 2007 regarding your organization's tax-exempt status.

Our records indicate your organization is exempt under section 501(c)(3) of the Internal Revenue Code. Your organization is included in the group ruling issued to the United States Conference of Catholic Bishops, which is not a private foundation within the meaning of 509(a) of the Code because it is described in sections 509(a)(1) and 170(b)(1)(A)(i).

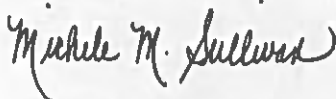
The United States Conference of Catholic Bishops is listed in Publication 78. Donors may deduct contributions to your organization under section 170 of the code.

As your organization is included in a group ruling, there is not an individual exemption letter for it. The group exemption letter applies to all of the subordinate organizations on whose behalf the United States Conference of Catholic Bishops has applied for recognition of exemption. If you want a copy of the group exemption letter, please contact your central organization.

If you are operating an educational organization that normally maintains a regular faculty and curriculum and normally has a regularly enrolled body of pupils or students in attendance at the place where its educational activities are regularly carried on, you are required to file Form 5578, *Annual Certification of Racial Nondiscrimination for a Private School Exempt From Federal Income Tax*. Form 5578 is due annually by the 15<sup>th</sup> day of the 5<sup>th</sup> month following the end of the organization's accounting period.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Michele M. Sullivan, Oper. Mgr.  
Accounts Management Operations 1

RECEIVED BY  
MAR 30 2007  
CATHOLIC SOCIAL  
SERVICES

# Cohesion Dance Project, Inc.

EIN Number: 45-5088857

Tanya W. Call, Artistic Director

1020 Argyle St.

Helena, MT 59601

Email: tanya@cohesiondance.org

Telephone: 406-422-0830

## **Total Grant Amount: \$1,000**

Total Amount Requested: \$4000

Funding from City: \$1,000

Funding from County: \$0

Funding from HACF: \$0

**Organization's Mission:** Cohesion Dance Project (Cohesion) is a non-profit dance production company with a mission to create engaging performances and integrated educational experiences that enrich, inspire, and unite the community through dance. Cohesion envisions a community with an expanded understanding of inclusion and acceptance of dance as an art form that fully embraces people of all ages, abilities, experiences, and backgrounds. Founded in 2012, Cohesion has grown, diversified and flourished, by providing contemporary dance training for community dancers, professional artists and people living with disabilities; staging multiple integrated professional performances each year; and conducting school and community outreach through movement arts education and adaptive dance classes for youth and adults living with disabilities.

**Description of Project of Program Receiving Funds:** Cohesion provides creative movement classes to schools and organizations across Helena and the state through its School and Community Outreach Program. This program serves diverse groups, including preschools for children with autism, special and general education classrooms (Pre-K through college), group homes for people with developmental disabilities, at-risk youth programs, and senior care facilities. Many of these groups face financial barriers, limiting their access and ability to pay for movement-based learning experiences.

Pre-K to 2nd-grade classrooms, particularly those serving children with disabilities and low-income families, experience significant benefits from Cohesion's movement classes but often have the least funding available. Due to increased demand, existing grant funds have been stretched thin, reducing the frequency of visits we can provide and limiting program expansion.

A \$4,000 grant from Combined Grant Opportunity would allow Cohesion to increase the frequency of movement classes for three pre-K to 2nd-grade classrooms from monthly or biweekly to weekly sessions; providing greater consistency, structure, and deeper engagement for students.



Additionally, this funding would support the expansion of services to three Head Start classrooms, introducing high-quality movement experiences to some of the community's most vulnerable young learners.

**Intended Use of Funds:** A \$4,000 grant will allow Cohesion to provide more consistent creative movement classes for younger students while also freeing up other grant funds to expand the School and Community Outreach Program, reaching more people across the community.

Expected Outcomes:

Improved Social-Emotional Health : 75% of participants will demonstrate growth in attention, focus, emotional regulation, self-awareness, and/or confidence after a series of weekly or biweekly classes.

Increased Physical Capacity : 75% of participants will show improved endurance, stability, flexibility, or strength when engaging in movement activities, following a series of weekly or biweekly classes.

Enhanced Readiness to Learn & Works with Others : 75% of students will exhibit greater patience, respect, listening skills, and teamwork after participating in a series of classes.

Measuring Impact:

Cohesion will assess the effectiveness of this grant through teacher surveys measuring student growth and engagement, reflective questioning and discussion with students, photo and video documentation, and observations by Cohesion teaching artists.

This funding will create meaningful, measurable improvements in students' social-emotional well-being, physical development, and learning readiness, strengthening their ability to succeed in and beyond the classroom.

**Brief Budget Summary:** Instructor Fees : \$3,465

Funds will primarily cover instructor fees, ensuring skilled teaching artists can provide consistent, high-quality creative movement classes to pre-K through 2nd-grade students.

Administrative Fees : \$435

This portion will support program coordination, scheduling, communication with schools and teachers, and tracking program impact.

Materials/Supplies : \$100

Funds will be used for props, music, and other materials that enhance engagement and learning in movement classes.

Total Grant Request: \$4,000

The total annual budget for Cohesion's School and Community Outreach Program is \$32,052. This grant will help sustain and expand movement class offerings for young students, increasing class frequency and accessibility for underserved groups.

**Expressed Public Benefit to the Residents of Helena:** Young children in our community are experiencing increased academic and behavioral delays due to the pandemic, as noted by the Deputy Director of the National Head Start Association. Additionally, reductions in PE and music classes in the Helena School District have significantly decreased student access to arts and movement-based learning.

Cohesion's creative movement classes help bridge this gap by supporting physical, social, emotional, and cognitive development. Through partnering exercises and body awareness activities, students build social skills. Mindfulness techniques aid in emotional regulation, while kinesthetic learning reinforces classroom curriculum concepts in an engaging, hands-on way.

Preschool teachers have observed significant benefits, sharing that these classes improve focus and attention, enhance body and spatial awareness, and support emotional regulation. One teacher noted, "Cohesion's movement classes are so important in our classroom. They help students attend and focus, regulate emotions, and navigate space with consideration for others. The movement provides creative and free self-expression, benefiting students' physical, emotional, and mental health."

By providing these creative movement experiences, Cohesion equips young children with essential tools to better manage emotions, interact positively with others, and engage more effectively in their learning environment; benefits that extend beyond the classroom into the greater Helena community.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: MAY 02 2013

COHESION DANCE PROJECT  
512 SUSSEX COURT  
HELENA, MT 59601

Employer Identification Number:  
45-5088857  
DLN:  
17053143348042  
Contact Person:  
ALICE T LI ID# 95032  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
509(a)(2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 24, 2012  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

COHESION DANCE PROJECT

Sincerely,

A handwritten signature in cursive script that reads "Holly O. Paz".

Holly O. Paz  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC

Letter 947 (DO/CG)

# Exploration Works

EIN Number: 81-0541491

Heather O'Neill

995 Carousel Way

Helena, MT 59601

Email: [heathero@explorationworks.org](mailto:heathero@explorationworks.org)

Telephone: 406-603-4130

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$3,995

Funding from City: \$2,000

Funding from County: \$0

Funding from HACF: \$0

**Organization's Mission:** Igniting a lifelong love for science to enrich Montana's future.

**Description of Project of Program Receiving Funds:** This grant would allow us to offer scholarships to 17 campers to participate in our summer camps.

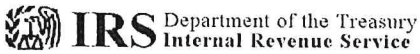
**Intended Use of Funds:** This will help us increase the number of participants in our programs. We expect to register 17 kids in summer camps with this scholarship funding. We can measure the impact by tracking all the funds distributed to each camper and ensuring they follow through by attending our camps.

**Brief Budget Summary:** The funds would be used to cover registration fees for low-income families so they can register their children in summer camps. Our camps are STEM focused and help enhance science education in Helena, while providing individual opportunities for children to change the course of their lives with a strong foundation for success.

Most students in Helena do not test at proficient levels in science. We operate to fill the gap and provide science enrichment to the community.

Camp registration fees are \$235 per student. These funds could send 17 campers to camp this summer.  $\$235 \times 17 = \$3,995$ .

**Expressed Public Benefit to the Residents of Helena:** This project creates opportunities for low-income families to enrich their children with higher level science education.



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0752258385  
June 16, 2017 LTR 4168C 0  
81-0541491 000000 00  
00039418  
BODC: TE

EXPLORATIONWORKS INC  
995 CAROUSEL WAY  
HELENA MT 59601-3396



037629

Employer ID Number: 81-0541491  
Form 990 required: Yes

Dear Taxpayer:

This is in response to your request dated June 07, 2017, regarding your tax-exempt status.

We issued you a determination letter in March of 2002, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

Our records also indicate you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If a return is required, you must file Form 990, 990-EZ, 990-N, or 990-PF by the 15th day of the fifth month after the end of your annual accounting period. IRC Section 6033(j) provides that, if you don't file a required annual information return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

For tax forms, instructions, and publications, visit [www.irs.gov](http://www.irs.gov) or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

# Florence Crittenton Home and Services

EIN Number: 81-0231788

Savannah Cribbs

3404 Cooney Dr.

Helena, MT 59602

Email: savannahc@florencecrittenton.org

Telephone: 406-442-6950

## **Total Grant Amount: \$3,812**

Total Amount Requested: \$3,812

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$1,812

**Organization's Mission:** Florence Crittenton provides innovative, comprehensive services and nurturing programs that engage and empower children, young adults and young families to thrive and build productive lives.

**Description of Project of Program Receiving Funds:** This grant will help equip our Child Enrichment Center and Residential program areas with appliances. The proposed purchases will complete our remaining kitchen needs following our Cooney Campus renovations. These appliances allow for us to accept and process donations of meat and produce, reducing grocery costs, and improving our ability to provide healthy, nutritious, and balanced meals. Nutrition is a key social determinant of health for families because access to healthy food options, knowledge about proper nutrition can significantly impact the overall well-being and long-term health outcomes of parents and children.

**Intended Use of Funds:** This grant will help our organization progress as we finalize renovations to our Cooney Campus, allowing for seamless co-located family services, increased capacity, new jobs created, and more effective and efficient program delivery. We can most directly correlate the impact of this specific grant to the number of healthy meals served each year, which is anticipated to exceed 40,000 at our full program capacity in residential and early childhood programs.

**Brief Budget Summary:** Reach in freezer: 1,399

— Commercial fridge: \$2,239

— Small fridge for toddler room for breast milk: \$174

**Expressed Public Benefit to the Residents of Helena:** Our residential and early childhood programs benefit our community as demonstrated by our FY2024 outcomes:

CEC: The Child Enrichment Center provides childcare to children aged 0-5 in a therapeutic, inviting environment that welcomes children with all abilities and walks of life. This program serves families in our residential program, as well as families from throughout the local community.

#### CEC Numbers Served

Total Served: 33 Children

Community: 19 Children

Residential: 14 Children

Best Beginnings Scholarship Recipients: 17 Children (51%)

#### CEC Program Highlights

—Commitment to Quality: Child Enrichment Center and CEC maintained Level 4 STARS to Quality status for the 6th year in a row

—Stakeholder Satisfaction: Per our FY24 Stakeholder Survey (includes staff and families): 100% believe the program upholds its mission. 83.3% feel the programs ensures their top priority is children's safety and well-being.

—Program Expansion: In January 2024, CEC remodel was completed. The newly renovated CEC space created 20 additional spots for children, including 8 additional infant and toddler spots.

—Integrated Services: CEC partnered with Intermountain to bring on-site speech services to children that qualified to receive this support, as well as the FC Clinical Director to provide Infant & Early Childhood Mental Health Consultation services.

—Nutrition: Served Over 9,300 fresh, healthy meals served to children

Residential Services: Florence Crittenton's Residential Services provide a safe, home-like living environment and supportive services to families experiencing housing insecurity, mental health and substance use challenges, and experiences of trauma.

#### Residential Numbers Served

Youth Maternity Home: 2 Families (opened in November, 2023; first families in late February, 2023)

Women and Children's Recovery Home: 13 Families

Transitional Living Apartments Program: 5 Families

#### Residential Program Highlights

— Safety: Safety is the greatest priority in our program. In FY2024, there were zero reported safety incidents, accidents, or grievances relating to employees or clients.

— Access to services: 100% of residential clients received addiction counseling, case management, childcare, and mental health services:

o Peer Support: 2,242 Services

o Targeted Case Management: 985 Services

o Individual Therapy: 372 Services

o Group Therapy: 337 Services

— New Facility/Program Expansion: In June, 2024 FC moved into its new residential program area on the Cooney campus. The new space provides space for 8 families in our Recovery Home, 6



families in our Youth Maternity Home (2 additional families from our Harris facility), and 2 flex beds that will help families transitioning in and out of our residential programs.

**Internal Revenue Service**

**Date:** July 12, 2005

FLORENCE CRITTENTON HOME &  
SERVICES  
901 N HARRIS  
HELENA MT 59601-3000

**Department of the Treasury**  
**P. O. Box 2508**  
**Cincinnati, OH 45201**

**Person to Contact:**

Kathy Masters ID# 31-04015  
Customer Service Representative

**Toll Free Telephone Number:**

8:30 a.m. to 5:30 p.m. ET  
877-829-5500

**Fax Number:**

513-263-3756

**Federal Identification Number:**

81-0231788

Dear Sir or Madam:

This is in response to your request of July 12, 2005, regarding your organization's tax-exempt status.

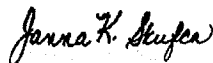
In May 1925 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records indicate that your organization is also classified as a public charity under section 509(a)(2) of the Internal Revenue Code.

Our records indicate that contributions to your organization are deductible under section 170 of the Code, and that you are qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Internal Revenue Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Janna K. Skufca, Director, TE/GE  
Customer Account Services

# Friendship Center

EIN Number: 23-7131678

Kim Patterson, Development Director

1430 N. Sanders St.

Helena, MT 59601

Email: kim.p@thefriendshipcenter.org

Telephone: 406-442-6800

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$2,000

Funding from County: \$0

Funding from HACF: \$2,000

**Organization's Mission:** The mission of The Friendship Center (TFC) is to provide a safe haven for those affected by domestic violence, sexual assault, and stalking and to empower our community to flourish in relationships free from violence. We envision a Helena community where every person thrives in safe and healthy relationships.

**Description of Project of Program Receiving Funds:** TFC's 24/7 crisis line stands as a lifeline for individuals experiencing domestic violence, sexual assault, and stalking (DVSA), as well as their family members in moments of crisis. Operating around the clock, the crisis line offers immediate support and intervention, ensuring that victims have access to critical help when they need it most. Since the onset of the COVID-19 pandemic, the importance of this service has only increased. The crisis line has become the primary way victims seek help, making it one of the most indispensable services TFC provides. The crisis line can be life-changing; and in many cases, life-saving. In 2024, TFC received 2,162 calls to our crisis line from individuals seeking help related to DVSA.

TFC incurs an annual service cost of \$15,000 to operate the crisis line. A \$4,000 grant from the Helena Area Community Foundation towards service costs would be a crucial investment and cover more than 25% of the yearly fee. This funding would directly support the infrastructure needed to maintain the crisis line, ensuring victims have reliable access to TFC's critical services.

**Intended Use of Funds:** In addition to receiving 2,162 calls to our crisis line from individuals seeking help related to DVSA in 2024, we provided 8,952 total services including crisis intervention, crisis line counseling, in-person crisis counseling, legal advocacy, and safety planning to 733 clients. We also provided 19,373 nights of shelter to 135 adults and 58 children. While we do not set numerical goals for the services we provide, we anticipate fielding more than 2,000 crisis calls again in 2025 and providing support services to 700 individuals. Our overarching

goal is to provide support services to 100% of DVSA victims that seek our assistance. This will be tracked through our confidential client services database that is specifically designed for organizations that serve DVSA victims. The database will allow us to monitor the number of clients served, crisis line calls received, crisis intervention and emergency assistance offered, and nights of shelter provided.

A small grant in support of our crisis line service costs will have a profound impact on our ability to provide services to 100% of DVSA victims. The crisis line serves as a crucial first step in connecting survivors with immediate safety planning, emotional support, and access to further services.

Funding will help us maintain 24/7 crisis line coverage, ensuring that no call for help goes unanswered and that survivors have access to compassionate, trained advocates.

**Brief Budget Summary:** Crisis Line Service Cost - \$15,000.00

**Expressed Public Benefit to the Residents of Helena:** DVSA crimes continue to profoundly affect Montanans, and the gravity of what survivors experience cannot be overstated. The most recent data from the Montana Board of Crime Control (MBCC) Statistical Analysis Center shows that domestic violence remains one of the most frequently reported crimes in Montana. According to comprehensive statistics from MBCC, there were 488 Partner and Family Member Assaults in Lewis and Clark County in 2023 alone, including 14 kidnappings and 62 sex offenses. There were an additional 731 sexual offenses in non-domestic relationships. It is important to recognize that these figures do not account for the significant number of DVSA offenses that go unreported to law enforcement.

TFC is the only sexual assault and domestic violence service agency providing comprehensive support to primary and secondary victims of DVSA crimes in Lewis and Clark, Broadwater, and Jefferson counties, with most of our clients residing in the greater Helena area. By maintaining a fully operational crisis line, victims in crisis can connect with trained advocates who provide emotional support, risk assessment, referrals to community resources, and assistance with safety planning. This not only helps survivors escape dangerous situations but reduces the overall impact of DVSA on the community by promoting early intervention and access to resources.

The crisis line is an essential part of Lewis and Clark County's public safety infrastructure, regularly utilized by first responders, the Helena Police Department, and the Lewis and Clark County Sheriff's Office, all of whom work closely with TFC to respond to victim crimes. Additionally, the local hospital relies on the crisis line, calling our victim advocates to attend sexual assault exams and provide support to victims, allowing nursing staff to focus on completing the sexual assault kit and delivering medical care. Law enforcement officers and hospital personnel also distribute victim resource information and connect victims directly with crisis line advocates, ensuring survivors receive the support they need.

OGDEN UT 84201-0038

In reply refer to: 0441669846  
Feb. 10, 2010 LTR 4168C E0  
23-7131678 000000 00  
00043821  
BODC: TE

FRIENDSHIP CENTER OF HELENA INC  
1430 N SANDERS ST  
HELENA MT 59601-3012

30451

Employer Identification Number: 23-7131678  
Person to Contact: AL  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Feb. 01, 2010, request for information regarding your tax-exempt status.

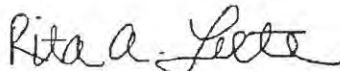
Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1971.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Rita A. Leete  
Accounts Management II

# Grandstreet Theatre

EIN Number: 81-0357843

Danielle Wineman, Interim Managing Director  
325 N. Park Street  
Helena, MT 59601  
Email: danielle@grandstreettheatre.com  
Telephone: 406-447-1574

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$4,000

Funding from City: \$1,000

Funding from County: \$0

Funding from HACF: \$1,000

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

**Description of Project of Program Receiving Funds:** Each summer, Grandstreet Theatre brings 8-10 visiting artists to the Helena community for eight weeks to perform in our summer stock productions and work as teachers during the two-week Grandstreet Summer Theatre School (GSTS). This grant seeks funding to offset the associated expenses for housing for the visiting artists who will perform in our summer production of Mary Poppins and work in our already-at-capacity Summer Theatre School.

**Intended Use of Funds:** Bringing visiting artists in to perform and teach at Grandstreet Theatre is a cornerstone of our summer stock/GSTS program. Most visiting artists are college-aged students majoring in musical theatre or dance programs at colleges and universities from across the country. These young professionals stay with area families in homestay arrangements while they are rehearsing, performing, and teaching. Grandstreet provides Helenans who open their doors to these artists a stipend of \$100/week (\$800/actor, for a total of \$6400-\$8000). Because we are also paying these artists a salary (\$3750) and paying their travel expenses (averaging \$500 per artist, depending on flights/gas), the expenses rack up quickly. The benefits, however, far outweigh the costs; our students gain invaluable experience in the performing arts working with these professional artists, and our community has access to live theatre of the highest caliber each summer.

**Brief Budget Summary:** If awarded, the grant funding will support the stipends that we pay to local families who graciously welcome the visiting artists into their homes. Homestay families receive \$100 per week for each actor they house; we estimate 10 actors will join us in Helena for

eight weeks this summer (contracts are currently undergoing finalization) for a grand total of \$8,000. We are asking for \$4000 to offset this expense.

**Expressed Public Benefit to the Residents of Helena:** GSTS is a Helena tradition, and many folks in town talk about seeing hundreds of kids in their t-shirts throughout the downtown area rehearsing, learning, and making friends. In the final showcase performance, the community gets to enjoy the product of all their hard work and the incorporation of their new skills. By diversifying our teaching artists, our students have the opportunity to see and work with professionals with different styles, methodologies, and backgrounds than the year-round Grandstreet faculty.

In addition to the impact on our students, patrons of the theatre benefit from the experience of seeing these visiting artists perform on stage during our summer productions. Last summer, 3848 patrons attended our mainstage production of Newsies, which featured 8 visiting artists. These patrons are not just local to the Helena area but from all over the nation, as Grandstreet opens its doors to many tourists visiting the Helena area; nearly 20% of patrons who saw Newsies were from outside of Helena and 8% were from out of state. In addition, our visiting artists often invite their own friends and families to come to Montana to experience the magic of a Helena summer and see them on stage; these visitors stay in hotels, eat at restaurants, visit our attractions, etc.

Internal Revenue Service

Department of the Treasury

District  
Director

Person to Contact: EO:TPA

BROADWATER PRODUCTIONS, INC.  
BOX 1258  
HELENA, MONTANA 59624-1258

Telephone Number: 1-800-829-1040  
312-435-1040

Refer Reply to: 94-3057

Date: September 30, 1994

RE: EXEMPT STATUS  
EIN: 81-0357843

This is in response to the letter, dated September 22, 1994, regarding your status as an organization exempt from Federal income tax.

Our records indicate that a ruling letter was issued in August 1975, granting your organization an exemption from Federal income tax under the provisions of Section 501(c)(3) of the Internal Revenue Code of 1954. Our records also indicate that your organization is not a private foundation but one that is described in Section 509(a)(2) of the Internal Revenue Code.

Contributions made to you are deductible by donors in computing their taxable income in the manner and to the extent provided in Section 170 of the Internal Revenue Code.

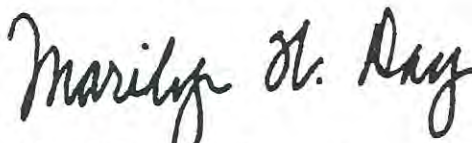
If your gross receipts each year are normally \$25,000 or more, you are required to file Form 990, Return of Organizations Exempt from Income tax by the fifteenth day of the fifth month after the end of your annual accounting period.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under Section 511 of the code. If you are subject to this tax, you must file an income tax return on F-990-T.

If any questions arises with respect to your status for Federal income tax purposes, you may use this letter as evidence of your exemption.

This is an advisory letter.

Sincerely yours,



Marilyn W. Day  
District Director



Ronald K. Kjerland (206) 442-5110

District Director

## Internal Revenue Service

Date: SEP 25 1975

In reply refer to: EP/EO:EO1:RKK  
L-391, Code 428

SEA:EO: 75-1598

▷ Broadwater Productions, Inc.  
555 Fuller Ave.  
Helena, MT 59601

Accounting Period Ending: March 31

Form 990 Required: ☒ Yes ☐ No

Advance Ruling Period Ends: March 31, 1977

Dear Applicant:

Based on the information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization of the type described in section 509(a)(2).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins on the date of your inception and ends on the date shown above.

Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization so long as you continue to meet the requirements of the applicable support test. If, however, you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, in the event you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. In addition, if you submit the required information

(over)

Form L-391 (4-73)



within the 90 days, grantors and donors may continue to rely on the advance determination until the Service makes a final determination of your foundation status. However, if notice that you will no longer be treated as a section 509(a)(2) organization is published in the Internal Revenue Bulletin, grantors and donors may not rely on this determination after the date of such publication. Also, a grantor or donor may not rely on this determination if he was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(2) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(2) organization.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

You are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. You are not liable for the taxes imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions concerning these taxes, please let us know.

If your sources of support, or your purposes, character, or method of operation is changed, you should let us know so we can consider the effect of the change on your status. Also, you should inform us of all changes in your name or address.

If the yes box at the top of this letter is checked, you are required to file Form 990, Return of Organization Exempt From Income Tax, only if your gross receipts each year are normally more than \$5,000. The return is due by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, for failure to file the return on time.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Sincerely yours,

*Michael Sassi*

Michael Sassi  
District Director

# Hands on Global/ HAART

EIN Number: 82-1150310

Valerie Hellermann, Executive Director  
2712 Billings Ave  
Helena, MT 59601  
Email: valerie.handsonglobal@gmail.com  
Telephone: 406-439-3580

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** Hands on Global serves the disadvantaged and displaced, hand-to-hand and heart-to-heart by providing holistic and healthcare support through partnerships and collaboration.”

HARRT - Our mission is to welcome and support refugees and immigrants as they navigate the challenges of resettlement, providing them with resources to access essential benefits, job opportunities, and ESL education. Through guidance, advocacy, and community connection, we empower individuals on their path to independence, integration and self-sufficiency.

**Description of Project of Program Receiving Funds:** For refugee children, summer isn't just a break from school; it's a critical time to maintain language skills, build friendships, and continue feeling connected to their new home. Without structured activities, they risk losing the progress they've made in English and social integration.

We are registering ten of our elementary-aged children for Kay's Kids, ensuring they stay engaged, active, and learning. However, our four middle schoolers face an even greater challenge. Middle school can be a tough transition for any child, but for these four kids; who have only recently arrived in Helena; the need for meaningful peer interactions is even more urgent. They need opportunities to connect with others their age, practice their language skills, and form lasting friendships that will help them feel a sense of belonging.

Their well-being and future success as students and members of our community depend on it. We are seeking support to provide enriching summer opportunities that will give these children the confidence, friendships, and skills they need to thrive.

Included in this need is transportation for all these kids. HARRT has an 11 seat van, we need to hire a driver.

**Intended Use of Funds:** This grant will be instrumental in supporting our mission to help refugee families build self-sufficient lives in Helena. By ensuring that refugee children have access to enriching summer programs, we allow their parents to continue working, confident that their children are in a safe and supportive environment. It will also provide a driver (with our 11 seat van) to be paid for daily drop off and pick up. Transportation is a huge issue and paying a driver is essential. Due to changes in the federal resettlement of refugees, we have lost all resettlement funding.

**Brief Budget Summary:** 4 Middle school kids will attend HOWL camp (Helena Outdoor Wilderness Learning) x 2 weeks \$335 per week per child=\$2680  
Transportation for 14 kids x 10 weeks @\$50 per day =\$2000 (HARRT will pay \$650) asking \$1350.  
total grant request \$4000

**Expressed Public Benefit to the Residents of Helena:** Diversity enriches our Helena community, creating opportunities to share cultures, broaden perspectives, and foster global understanding. Through our refugee program, we are building bridges; bringing together people from different backgrounds to learn from and support one another.

Our children are the heart of this future. The friendships they form today will shape a more inclusive and compassionate tomorrow. As they grow together; playing, learning, and embracing one another's differences; they will naturally develop a deep appreciation for diversity. Their innate acceptance reminds us all of the power of kindness, connection, and an open heart.

By nurturing these relationships, we are not just helping refugee children feel at home; we are strengthening our entire community, ensuring that Helena remains a place where everyone belongs.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **APR 24 2017**

HANDS ON GLOBAL INC  
5210 KERR DRIVE  
HELENA, MT 59602-0000

Employer Identification Number:  
82-1150310  
DLN:  
26053509002207  
Contact Person:  
CUSTOMER SERVICE ID# 31954  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
April 11, 2017  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 947

HANDS ON GLOBAL INC

Sincerely,

*Stephen A. Martin*

Director, Exempt Organizations  
Rulings and Agreements

Letter 947

# Helena Food Share

EIN Number: 363507623

Tim Joyce  
PO Box 943  
Helena, MT 59624  
Email: [tim@helenafoodshare.org](mailto:tim@helenafoodshare.org)  
Telephone: 406-443-3663

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$2,000

Funding from City: \$1,000

Funding from County: \$0

Funding from HACF: \$1,000

**Organization's Mission:** Helena Food Share's mission is to serve our neighbors in need by providing food in a respectful and dignified way and, by working with others, eliminate hunger in the greater Helena area.

**Description of Project of Program Receiving Funds:** A grant in this range would help Helena Food Share purchase food containers for our new rescued food meal program. Using our commercial kitchen, we prepare nutritious soups, sides, and meals for distribution through the Grocery Share Market.

Over 80% of the ingredients in these meals come from rescued food at local Helena grocery stores, allowing us to provide fresh, ready-to-eat options for individuals facing barriers to cooking, such as those experiencing homelessness, people with disabilities, and single parents.

A \$2,000 grant for food packaging would help provide thousands of meals over the next year, ensuring more people have access to healthy, ready-to-eat food. Reliable packaging and distribution are essential to the program's success in feeding our neighbors in need.

**Intended Use of Funds:** A small grant would directly support the expansion of this new programmatic addition to our nutrition initiative by covering the cost of packaging, allowing us to efficiently distribute more meals to Helena Food Share Customers.

Expected outcomes include:



- A dramatic increase in the number of healthy packaged meals and sides provided to customers in need. Based on what we were able to produce in the first months of this year projections indicate that we have to potential to produce nearly 25,000 prepared entrees and sides in 2025.

- Improved access to healthy, prepared foods for individuals with limited cooking facilities and lack of stable sources of food and housing.

- Last year Helena Food Share rescued 825,007 pounds of food. The success of this program will lead to Increased utilization of rescued food, reducing food waste while feeding our community members most in need of food support.

- Exposure to different types of healthy food and recipes that will include things like lentils and wheatberries, many of which are grown in Montana

We will measure impact by tracking the number of meals distributed by size and type, measuring the increase in demand for prepared meals over time and soliciting customer feedback about the products.

**Brief Budget Summary:** Grant funds will be used to purchase food containers necessary for distributing prepared meals from our commercial kitchen. These meals serve individuals who lack access to cooking facilities, including people experiencing homelessness, individuals with disabilities, and single parents with limited resources.

Estimated budget allocation for meal packaging:

- Grab-and-Go containers (qty 5200): \$7,124 total annual cost

- Quart containers with Lids (qty 3900): \$1,950 total annual cost

- 2 oz containers with lids (qty 2500): \$149 total annual cost

- Pint containers with Lids (qty 15,600): \$2,340 total annual cost

- Total yearly cost of packaging: \$11,563.00

A \$2,000 grant would nearly cover the annual cost of our most-used 1/2-pint containers or fully fund the larger quart-size containers. This support would help us continue providing nutritious meals and ensure our to-go meal program runs uninterrupted through 2025, reaching those who need it most.

**Expressed Public Benefit to the Residents of Helena:** Providing food to our neighbors in need has been at the core of Helena Food Share's work since 1987. With the move to our new



facility and the commercial kitchen in full operation, we are realizing the game changer that prepared meals made from rescued food can be for this community.

Starting in December we begun piloting this program and have already stocked the shelves of the Grocery Share Market with thousands of meals from soups and stews to healthy salads and well-rounded meals. Local chefs have come and cooked food for our customers, our kitchen manager and a team of volunteers makes these meals nearly every day, and the response from customers has been very positive.

The most important benefit that we are bringing to our customers, and the community is providing healthy homemade fresh meals for people who may not have access to that type of food on a regular basis.

Healthy and nutritious foods are the building blocks of a healthy community, and we believe that everyone should have access to that. We also believe that by sharing food we share hope, and this email message from one of our customers underscores the importance of this program for everyone in need of food in the greater Helena area.

"Thank you, to whoever put the love into making the lentil soup that I picked up in a container at the end of December. It was lentil, sausage, vegetables etc. Great recipe, great taste, and probably the healthiest one meal I would eat in the span of a month. 🙌🏻"

Internal Revenue Service

Department of the Treasury

District  
Director

Person to Contact: EO:TPA

HELENA FOOD SHARE INC  
PO BOX 943  
HELENA, MT 59624-0943

Telephone Number:  
1-800-829-1040

Refer Reply to: 97-0732

Date: May 29, 1997

RE: EXEMPT STATUS  
BIN: 36-3507623

This is in response to the letter, dated May 29, 1997, regarding your status as an organization exempt from Federal income tax.

Our records indicate that a ruling letter was issued in May 1987, granting your organization an exemption from Federal income tax under the provisions of Section 501(c)(3) of the Internal Revenue Code of 1954. Our records also indicate that your organization is not a private foundation but one that is described in Section 509(a)(1) & 170(b)(1)(A)(vi) of the Internal Revenue Code.

Contributions made to you are deductible by donors in computing their taxable income in the manner and to the extent provided in Section 170 of the Internal Revenue Code.

If your gross receipts each year are normally \$25,000 or more, you are required to file Form 990, Return of Organizations Exempt from Income tax by the fifteenth day of the fifth month after the end of your annual accounting period.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under Section 511 of the Code. If you are subject to this tax, you must file an income tax return on F-990-T.

If any question arises with respect to your status for Federal income tax purposes, you may use this letter as evidence of your exemption.

This is an advisory letter.

Sincerely yours,



Bobby E. Scott  
District Director

# Helena Indian Alliance

EIN Number: 81-0304870

Amanda Lott - Community Resource Advocate

501 Euclid ave

Helena, MT 59601

Email: [alott@hia-mt.org](mailto:alott@hia-mt.org)

Telephone: 406-442-9244

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** The Helena Indian Alliance advocates for and serves the mental, physical, spiritual, and social wellness of the American Indian/Alaska Native population and the Helena community.

**Description of Project of Program Receiving Funds:** A grant in the amount of \$4,000 would assist Helena Indian Alliance in our Community Assistance program in which we offer emergency needs such as hygiene items, laundry detergent, diapers or formula for children, and gas cards/bus passes to get to necessary medical or mental health appointments for the remainder of 2025.

**Intended Use of Funds:** This small grant will ensure ongoing funds to sustain this program along with other funding that is secured in throughout the year. The outcomes expected from this grant are to meet emergency needs of the community and break down small barriers including transportation to ensure better access to mental health and medical services. We will measure impact two ways, first by individual follow up through the Community Resource Advocate to ensure people who've sought assistance, got the resources and help they needed, successfully attended appointments, etc. Secondly, through our online scheduling system where we track data on number of no shows a patient has and ensure that with providing gas cards or bus passes, they were able to attend all necessary appointments and that, this specific data improved.

**Brief Budget Summary:** The \$4,000 will be allocated to essential items for individuals in our care. The breakdown is as follows:

\$500 - Hygiene items that includes soap, shampoo, toothpaste, deodorant, feminine hygiene products, adult diapers, and other personal care products given on a need basis.

\$500 - Laundry detergent/laundry supplies

This amount will be used to purchase detergent and/or dryer sheets and available for patients to receive once bi-monthly.

**\$800 - Diapers**

Funds will be used to purchase diapers for infants and toddlers, ensuring an adequate supply for at least a month.

**\$500 - Formula**

This will cover the cost of infant formula for patients who need to supplement WIC or did not qualify for WIC, based on monthly consumption.

**\$1,500 - Gas Cards**

Gas cards will be bought at Circle K and given out to patients in \$20 intervals for the sole purpose of transportation to and from medical and/or mental health appointments.

**\$200 - Bus Passes**

This will provide bus passes for public transportation to medical appointments, work, and other necessary travel on an as needed basis.

**Expressed Public Benefit to the Residents of Helena:** An overall improvement of access to medical care and mental health services, as well as increased resources for community members who are in immediate need of essentials. We believe in treating all of our patients, holistically, and meeting an immediate need first, before addressing other areas.

District Director

EP/EO:EO-II:RJL

Date: Jpk 14 1979

Employer Identification Number:

81-0304870

Accounting Period Ending:

June 30

Form 990 Required: ☒ Yes ☐ No

Person to Contact:

John Sutton

Contact Telephone Number:

(206) 442-5106

SEA:EO:79-308

► Helena Indian Alliance  
436 North Jackson  
Helena, MT 59601

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

We have further determined that you are not a private foundation within the meaning of section 509(a) of the Code, because you are an organization described in section 509(a)(1) and 170(b)(1)(A)(vi).

If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. Also, you should inform us of all changes in your name or address.

Generally, you are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the waiver, you should contact us. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Since you are not a private foundation, you are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

The box checked in the heading of this letter shows whether you must file Form 990, Return of Organization Exempt from Income tax. If Yes is checked, you are required to file Form 990 only if your gross receipts each year are normally more than \$10,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

P.O. Box 21224, Seattle, Washington 98111

(over)

Letter 947(DO) (5-77)

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter, we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees.

If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

*Arturo A. Jacobs*

Arturo A. Jacobs  
District Director

# Helena Symphony

EIN Number: 81-0352076

Cameron Betchey, Director of Development & Communications  
21 North Last Chance Gulch Suite 100  
Helena, MT 59601  
Email: [development@helenasympphony.org](mailto:development@helenasympphony.org)  
Telephone: 406-442-1860

## **Total Grant Amount: \$1,000**

Total Amount Requested: \$4,000

Funding from City: \$500

Funding from County: \$0

Funding from HACF: \$500

**Organization's Mission:** The mission of the Helena Symphony is to engage, enrich, transform, and inspire lives through music. This mission is realized through the core values of community engagement, inclusivity, financial sustainability, organizational viability, education, and artistic excellence.

**Description of Project of Program Receiving Funds:** On Saturday July 19, 2025, the Helena Symphony will welcome more than 16,000 attendees to the campus of Carroll College for the 21st annual Intrepid Credit Union Symphony Under the Stars, a free concert for thousands hosted by the Helena Symphony Orchestra & Chorale. Symphony Under the Stars has been a beloved Helena tradition for more than 20 years, welcoming people from across Montana and the Rocky Mountain West. Symphony Under the Stars is a free event, eliminating potential economic barriers between attendees, this performance, and connection to the Helena nonprofit and arts community. A grant provided by the Helena Area Community Foundation allows the Helena Symphony to maintain the growth and safety of Symphony Under the Stars for thousands.

The vision of the Helena Symphony is to connect the community through music and be integral to life in the region. Symphony Under the Stars epitomizes this vision, welcoming people of a multitude of backgrounds to the Helena community. Symphony Under the Stars also infuses more than \$1,000,000 into the local economy throughout the third weekend in July each summer. An event at the scale of Symphony Under the Stars requires resources to ensure the safety of attendees at the concert such as police and firemen services on site, as well as investment in the community engagement perspective of the event such as a volunteer coordinator to manage dozens of community volunteers and ASL interpreters on site for those in need of accessibility services. Through the support of a Helena Area Community Foundation grant, the meaningful need for a community event centered around arts and education that welcomes people from across the

state is extremely valuable to the Helena and larger Montana community. A grant of \$500 - \$4,000 will fund services that will fulfill the need for safety staff, expansion of accessibility access, and ensure a plentiful group of well trained volunteers to assist with any needs guests may have.

**Intended Use of Funds:** Although the budget for Symphony Under the Stars is significant, it is composed of many small pieces that contribute to the overall success of Symphony Under the Stars. A small grant will allow the Helena Symphony to fund essential pieces of Symphony Under the Stars in 2025 that contribute to the Helena Symphony's dedication to community engagement and education opportunities at this performance and throughout the year. Through this grant, the Helena Symphony expects to accomplish several major Symphony Under the Stars goals including welcoming more than 17,000 attendees on July 19th, raising more canned good donations for Helena Food Share than in the previous year (17,000 lbs in 2024), and increasing accessibility and safety for all in 2025.

We intend to measure the impact of the grant fund usage through engagement at the 21st annual Symphony Under the Stars. This engagement will be measured through quantitative data collected by the Symphony staff related to crowd size, canned food donations, data from food vendors present, and the number of children and family members engaged with the education tent hosted by the Helena Music Teachers Association. The impact of these funds will allow for growth in each of these areas as the use of funds is directly related to capacity building of the audience and resources to support attendees. These resources include the presence of the fire and police department, as well as the volunteer coordinator that trains and supports volunteers that assist with food collection, guest services, and golf cart services for guests in need of accessibility assistance.

Symphony Under the Stars not only makes a positive impact each year on the community and organizations we partner with, but also the Helena Symphony Orchestra & Chorale. Symphony Under the Stars allows the Helena Symphony to reach thousands, encouraging community members to attend other Masterworks and Education performances throughout the year. Symphony Under the Stars also helps to attract and maintain our orchestra from across the United States as it continues to be one of the largest symphonic performances in the Rocky Mountain West and allows musicians to perform with noted soloists including Capathia Jenkins, Nova Payton, and LaKisha Jones.

**Brief Budget Summary:** Funds from the Helena Area Community Foundation grant will be used to support safety, accessibility services, and volunteer services on site at Symphony Under the Stars. The grant funds will be used specifically to secure the services of the Fire Department (\$500), Police Department (\$1,300), ASL Interpreters (\$1,000), and 2025 Symphony Under the Stars Volunteer Coordinator (\$1,500). The partnership of the Police and Fire Departments will ensure guest safety on site at Symphony Under the Stars, and the ASL Interpreter and Volunteer Coordinator will directly impact the audience experience for thousands. Although Symphony Under the Stars operates on a budget of more than \$160,000, a small grant from the 2025 Helena



Area Community Foundation grant cycle will play a meaningful role in the continued capacity and quality of this landmark Helena event.

**Expressed Public Benefit to the Residents of Helena:** Symphony Under the Stars is a profound source of unity, culture, education, and celebration of the Helena community each year by bringing more than 16,000 people to the campus of Carroll College for a performance that connects the community with music and a broad array of local nonprofit organizations and businesses. Each summer the Helena Symphony Orchestra welcomes musicians from across the United States and nationally noted guest soloists to perform at one of the largest outdoor symphonic performances in the Rocky Mountain West. The theme of Symphony Under the Stars rotates each year, introducing community members to fresh interpretations on well known, pop, rock, jazz, and modern music, making Symphony Under the Stars an engaging attraction for people of every age group. Members of the Helena and larger Montana community are welcomed to this performance at no charge.

This project directly benefits the residents of Helena, Lewis & Clark County, and the larger community by providing an opportunity for community members of all backgrounds to engage with the arts, other local organizations such as Helena Food Share and Carroll College, and with thousands of other community members. Over the last 4 years the Helena Symphony has seen audiences increase at performances throughout the year, including Symphony Under the Stars, as community members express a desire for activities that allow them to engage with each other with no significant financial barrier. Symphony Under the Stars continues to be an example of an inclusive and accessible event for all.

The Helena Symphony also continues to expand access to Symphony Under the Stars for all in the Helena community. In 2024 the Helena Symphony offered the opportunity for those in need of hearing accessibility to watch the performance with an ASL interpreter. The feedback from those who participated was extremely positive, and the Helena Symphony intends to offer this service once more and increase awareness of it in 2025. This is one example of how the Helena Symphony continues to evolve Symphony Under the Stars to fit the needs of the community, and create an environment for all to experience the transformational power of music.

“Each summer, the Helena Symphony spotlights food insecurity in our community through its annual Symphony Under the Stars concert. The Symphony has used this event to encourage concertgoers to bring canned food items to hold down blankets and then donate them to Helena Food Share. The Symphony Under the Stars event is our largest food drive, with donations ranging from 15,000 to 24,000 pounds each year. This event provides much-needed assistance to our neighbors in need and helps us create a hunger-free community.” : Helena Food Share

“Carroll College is proud to host Symphony Under the Stars, a cherished tradition that has brought the Helena community together for 20 years. This event fosters a deep sense of community spirit, uniting people of all ages and backgrounds in a shared celebration of music and connection. As one of the nation’s premier outdoor symphony events, it not only enriches the cultural fabric of our

region but also provides a significant economic boost to local businesses, as families and visitors plan their vacations around this highly anticipated evening each summer.

Our partnership with the Helena Symphony, Intrepid Credit Union, and Helena Food Share exemplifies the power of collaboration in strengthening our community. The impact of Symphony Under the Stars extends far beyond the music; it is a tradition that builds connections, inspires joy, and enhances the quality of life in Helena. Carroll College is honored to be part of this meaningful event and looks forward to seeing this musical tradition continue for years to come.” : Carroll College

Internal Revenue Service

Department of the Treasury

P. O. Box 2508  
Cincinnati, OH 45201

Date: May 6, 2003

Helena Symphony Society  
P. O. Box 1073  
Helena, MT 59624

Person to Contact:  
Shirley Rudolph 31-03949  
Customer Service Specialist  
Toll Free Telephone Number:  
8:00 a.m. to 6:30 p.m. EST  
877-829-5500  
Fax Number:  
513-263-3756  
Federal Identification Number:  
81-0352076

Dear Sir or Madam:

This is in response to your request of May 6, 2003 regarding your organization's tax exempt status.

Our records indicate that a determination letter issued in August 1979 granted your organization exemption from federal income tax under section 501(c)(3) of the Internal Revenue Code. That letter is still in effect.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in section 509(a)(2).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Helena Symphony Society  
81-0352076

Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

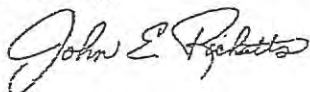
The law requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. If your organization had a copy of its application for recognition of exemption on July 15, 1987, it is also required to make available for public inspection a copy of the exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. You can charge only a reasonable fee for reproduction and actual postage costs for the copied materials. The law does not require you to provide copies of public inspection documents that are widely available, such as by posting them on the Internet (World Wide Web). You may be liable for a penalty of \$20 a day for each day you do not make these documents available for public inspection (up to a maximum of \$10,000 in the case of an annual return).

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

This letter affirms your organization's exempt status.

Sincerely,



John E. Ricketts, Director, TE/GE  
Customer Account Services

# Holter Museum of Art

EIN Number: 81-0472958

Christina Barbachano, Executive Director  
12 E. Lawrence St  
Helena, MT 59601  
Email: executive@holtermuseum.org  
Telephone: 406-442-6400

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$4,000

Funding from City: \$1,000

Funding from County: \$0

Funding from HACF: \$1,000

**Organization's Mission:** At the Holter Museum of Art, we aspire to be a beacon of artistic excellence through innovative exhibitions, inspiring creativity in our educational programs, and forging meaningful connections between artists, artworks, and our community. Committed to showcasing both established and emerging artists, we aim to be a vibrant hub that celebrates the power of art, in all its forms and expressions, to transform lives.

**Description of Project or Program Receiving Funds:** The Holter Museum of Art respectfully requests \$4000 to impact the lives of up to 20 children throughout the summer of 2025 by providing full (\$400) or half (\$200) scholarships to attend the museum's transformative, engaging and creative summer camps. Scholarships will be awarded to children who exhibit financial need as determined by family income and financial hardship. We aim to provide high quality, high energy, high impact summer activities for children from Lewis and Clark County at a time when it has become a financial challenge for low-income families to pay for these opportunities for their children.

**Intended Use of Funds:** This grant will help the Holter increase the opportunities for low income children to participate in our excellent educational programming opportunities. The Holter's summer camps are very expensive to run for the museum and this grant will help keep our costs lower so that these scholarships can really make a difference in the lives of children who come from lower income families or even from families who are having a temporary financial/life disadvantage.

At the Holter Museum of Art, we believe Art is for ALL. We also believe in paying our staff a living wage. Sometimes these two values are at competing odds. These funds help the Holter meet in the middle - providing scholarships for students while allowing the Holter to continue meeting the ever-increasing costs of running our excellent summer camps. In addition, while we have always

offered approximately 50 partial scholarships each summer(out of 450 summer campers), our ability to do so has been limited due. An additional \$4,000 would help us increase our scholarship recipients to 70 needy children in the county.

The Holter can measure the impact of these scholarships through qualitative data that we collect in after camp surveys of families, as well as counting the number of returning families from week to week and summer to summer.

**Brief Budget Summary: Scholarships**

$\$400 \times 5 = \$2000$

$\$200 \times 10 = \$2000$

Total scholarships = \$4,000

\*Unknown amount of children who will need full versus half scholarships

Summer Camps average cost \$5,000 a week x 10 weeks = \$50,000 total expenses for summer camps 2025

**Expressed Public Benefit to the Residents of Helena:** Helena has a very high need to high quality care for children during the summer months at affordable costs. The Holter fills this need, and with an HACF grant, we can improve our reach and our outcomes. Montana is a very rural state and there is a well-researched epidemic of isolation and a dearth of resources, even in the larger cities, like Helena. In the summer months, there are not enough spaces available for low-income families for their children to experience high quality, creative and engaging educational opportunities. The Holter's educational programs are unique because they take place in the museum and children have access to world-class exhibits, visiting artists, master level teachers, innovative arts experiences, and opportunities to connect with peers in a safe, welcoming and activated environment. Scholarships will reduce barriers to these same opportunities and increase access to for families across the region.

INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
1100 COMMERCE STREET  
DALLAS, TX 75242

DEPARTMENT OF THE TREASURY

Date: MAY 31 1996.

HOLTER MUSEUM OF ART INC  
12 E LAWRENCE ST  
HELENA, MT 59601-4019

Employer Identification Number:  
81-0472958  
Case Number:  
366121062  
Contact Person:  
MRS. R. COOLEY  
Contact Telephone Number:  
(312) 886-6532  
Our Letter Dated:  
January 09, 1992  
Addendum Applies:  
No

Dear Applicant:

This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she ~~acquired knowledge that the Internal Revenue Service had given notice that you~~ would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



Bobby E. Scott  
District Director

Letter 1050 (DO/CG)

# Last Chance Curling Club

EIN Number: 85-4288289

Andy Welch, Board Member  
2047 N Last Chance Gulch (PMB 419)  
Helena, MT 59601  
Email: lastchancecurlingclub@gmail.com  
Telephone: 406-565-7549

## **Total Grant Amount: \$1,220**

Total Amount Requested: \$1,219

Funding from City: \$0

Funding from County: \$1,220

Funding from HACF: \$0

**Organization's Mission:** The Last Chance Curling Club's purpose is to promote the sport of curling in the Helena community through education, outreach, and by providing a safe, fun, inclusive, and friendly environment to foster public participation in the sport.

**Description of Project or Program Receiving Funds:** In July 2024, the City of Helena became a member of the American Association of Retired Persons (AARP) Network of Age-Friendly Communities. As outlined in the City of Helena's 2019 Growth Policy, statistically the Helena and Lewis and Clark County populations are older than national averages with nearly 40% of Helena residents ages 50 and older. The Growth Policy goes on to say that the aging population "warrants particular attention when addressing future needs," and "presents challenges for health care, transportation, and social interaction." As the age of our population continues to increase, developing opportunities for all-ages and abilities social and fitness programs is essential to fostering inclusion and elevating the overall well-being of our community. Last Chance Curling Club (LCCC) recognizes the unique opportunity we have in contributing to these goals.

Curling, as a sport, is very inclusive for those with limited mobility and disabilities. In December 2022, Montana Senior News highlighted curling and our then, barely year-old club, in a front page story that stated, "Whereas hockey and skiing depend on speed, agility, and being in tip-top shape, curling is a more relaxed adventure on ice, one that rewards strategy, finesse, and teamwork. One of the best features of the sport is that anyone can do it."

One of the key ways that curling can be tailored to those with limited mobility is through the use of adaptive broom heads that enable the curler to deliver the stone without crouching into a lunge; such is the typical delivery posture; using a method that is called "stick curling." LCCC currently has limited stick curling brooms, and those that we do have were built in-house using



wooden broom handles like those used for home cleaning. The weight of these homemade wooden handles can impede play, which puts players who use this equipment at an unfair disadvantage.

Using funds received from the HACF grant, LCCC will purchase five carbon fiber curling brooms and five adaptive broom heads to enable the club to have sufficient, proper, equitable equipment so that we can host a stick-curling focused Learn-to-Curl. To encourage the success of this event, LCCC will work with local non-profits and service providers such as AARP, Rocky Mountain Development Council and others to do targeted outreach to those in the community who can benefit most from this program. At capacity, the club can host 40 people for a Learn-to-Curl event which breaks down to 8 people per playing field or “sheet,” as it’s called in curling. Steed Arena has 5 curling sheets. Only one broom is needed per sheet because only one person delivers a stone at a time, so the equipment can be shared. After the successful completion of this pilot program, LCCC will then use the purchased equipment to support community members who wish to join the club for league play.

**Intended Use of Funds:** LCCC is an all-volunteer run organization. Our budget is small, efficient and largely made up of sponsorships and registration fees from our annual tournament, which is called a “bonspiel.” Since the establishment of our organization in the winter of 2020-2021, we have grown to approximately 110 members annually, and have taught the sport of curling to roughly 600 members in the Helena community.

One of the largest operating costs for LCCC is renting ice time at Steed Arena, the only indoor ice rink in the Helena area. We view education as a priority for the organization and often hold educational Learn-to-Curl events at a financial loss to the club because of the high cost of ice rental, so the importance of supplemental funding to help our organization host these events is high. With this grant we would be able to fully fund an adaptive curling-focused Learn-to-Curl event and continue to provide the members of our community with a fun, inclusive wellness outlet by utilizing the adaptive equipment in future education events and our regular curling leagues

**Brief Budget Summary:** Funds from this grant will go to purchase five adaptive “stick curling” broom heads (\$49.99 each) and five brooms (\$79.99 each), as well as two hours of ice rental time (\$285/hour) for an adaptive curling-focused Learn-to-Curl event. This Learn-to-Curl event will include two hours of instruction. As a committed partner in this program with HACF, LCCC will cover the additional ice time for set-up and take down of this event, as well as the costs associated with instruction (valued at \$400). This is a 36% project match.

**Expressed Public Benefit to the Residents of Helena:** The Board of the Last Chance Curling Club is committed to the idea that we do not simply exist to serve our membership, but that our club should shine as an example of what it means to be good neighbors. We recognize that we have a role to play in enhancing the health and vitality of the City, County and surrounding area, and we are excited at the prospect of leaning in to this work.

Lewis and Clark Public Health just completed the 2024 Community Health Needs Assessment;a fantastic barometer of need and opportunities related to our shared responsibility in community health. The Needs Assessment underscores that “social connectedness, and access to safe spaces for physical activity offers emotional and practical support, reduces isolation, and significantly defrays the substantial costs of poor public health and chronic illness on communities.”

In the four years since the club was formed, LCCC has hosted community Learn-to-Curl events with students at Helena High and Capital High Schools, teen programs with the Lewis and Clark Public Library, targeted opportunities for veterans and National Guard members, as well as open Learn to Curl events for the community-at-large. We know that by building a more inclusive curling community through continued work to reach all-ages and abilities we are improving the health outcomes in our area. We appreciate Helena Area Community Foundation’s continued support of our efforts.



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
P.O. Box 2508  
Cincinnati, OH 45201

LAST CHANCE CURLING CLUB  
2047 N LAST CHANCE GULCH PMB 419  
HELENA, MT 59601-0744

Date:  
07/28/2021  
Employer ID number:  
85-4288289  
Person to contact:  
Name: Customer Service  
ID number: 31954  
Telephone: 877-829-5500  
Accounting period ending:  
December 31  
Public charity status:  
509(a)(2)  
Form 990 / 990-EZ / 990-N required:  
Yes  
Effective date of exemption:  
December 14, 2020  
Contribution deductibility:  
Yes  
Addendum applies:  
No  
DLN:  
26053498003751

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements

Letter 947 (Rev. 2-2020)  
Catalog Number 35152P

# Lewis & Clark Humane Society

EIN Number: 81-6014910

Cassidy Cook  
2112 East Custer Ave  
Helena, MT 59602  
Email: ccook@lchsmontana.org  
Telephone: 406-442-1660

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$4,000

Funding from City: \$1,000

Funding from County: \$0

Funding from HACF: \$1,000

**Organization's Mission:** LCHS is a small, private, community-based, not-for-profit organization that provides shelter for unwanted and stray animals (primarily dogs and cats) while working to end pet overpopulation, reduce the need for euthanasia, and improve the humane treatment and well-being of companion animals. LCHS serves three counties in Southwestern Montana, encompassing a population of roughly 92,000 residents and services an area covering roughly 5,500 square miles. LCHS also provides shelter for the dogs and cats of animal cruelty cases going to trial.

**Description of Project or Program Receiving Funds:** \$4,000 can cover two full day spay/neuter clinics for the shelter, which can spay/neuter up to 50 animals, both sheltered and community animals. This will assist not only the shelter in our mission with the animals in our care, but also low-income community members who need assistance with spay/neuter services.

**Intended Use of Funds:** A \$4,000 grant would have a direct and immediate impact on our ability to provide essential spay/neuter services to pets in our community. This funding would cover two spay/neuter clinics at our shelter, allowing us to help reduce pet overpopulation and improve animal welfare by providing free or low-cost surgeries to those in need.

With this grant, we expect to spay or neuter approximately 50 animals, preventing hundreds of unwanted litters in the future. By reducing the number of stray and surrendered animals, we can ease the burden on our shelter and community resources. Spay/neuter also improves the health and behavior of pets, making them more adoptable and strengthening human-animal bonds.

We will measure the impact of this funding by tracking the number of surgeries performed, monitoring intake trends to assess the decrease in surrendered litters, and gathering feedback from pet owners on the benefits of the program. By funding these clinics, this grant will help break

the cycle of pet homelessness and ensure that more animals receive the care they need to live happy, healthy lives.

**Brief Budget Summary:** Veterinarian/Vet Tech Payroll: \$1,500

Vaccinations: \$500

Aftercare medication: \$250

Anesthetic: \$1,500

Surgical Supplies: \$250

**Expressed Public Benefit to the Residents of Helena:** This project will have a direct financial and operational impact on the City of Helena and Lewis & Clark County by reducing the burden on local resources dedicated to animal care, control, and sheltering. By providing spay/neuter services and critical veterinary care, we can prevent unwanted litters and reduce the homeless pet population, ultimately decreasing the number of animals entering the shelter system.

Fewer stray and surrendered animals mean lower costs for sheltering, feeding, and veterinary treatment, which are expenses that fall on the city, county, and taxpayers. Additionally, by reducing the number of homeless pets, we lessen the demand on animal control officers, who spend significant time and resources responding to stray, abandoned, and neglected animals. This allows them to redirect efforts toward public safety and other critical services.

Additionally, offering affordable or free veterinary care ensures that pet owners;especially those facing financial hardships;can keep their pets healthy, preventing unnecessary surrender due to medical costs. This strengthens the human-animal bond, reduces pet abandonment, and promotes responsible pet ownership throughout the community.

By investing in the well-being of Helena's pets, this project creates a more compassionate, sustainable community, where animals receive the care they need, and families can enjoy the companionship of healthy, well-cared-for pets.

**Internal Revenue Service**

**Date:** May 27, 2004

Lewis & Clark Humane Society  
P.O. Box 4455  
Helena, MT 59604-4455

**Department of the Treasury**  
**P. O. Box 2508**  
**Cincinnati, OH 45201**

**Person to Contact:**

Tracy Garrigus #31-07307  
Customer Service Representative

**Toll Free Telephone Number:**

8:00 a.m. to 6:30 p.m. EST  
877-829-5500

**Fax Number:**

513-263-3756

**Federal Identification Number:**

81-6014910

Dear Sir or Madam:

This is in response to your request of May 27, 2004, regarding your organization's tax-exempt status.

In February 1965 we issued a determination letter that recognized your organization as exempt from federal income tax. Our records indicate that your organization is currently exempt under section 501(c)(3) of the Internal Revenue Code.

Based on information subsequently submitted, we classified your organization as one that is not a private foundation within the meaning of section 509(a) of the Code because it is an organization described in sections 509(a)(1) and 170(b)(1)(A)(vi).

This classification was based on the assumption that your organization's operations would continue as stated in the application. If your organization's sources of support, or its character, method of operations, or purposes have changed, please let us know so we can consider the effect of the change on the exempt status and foundation status of your organization.

Your organization is required to file Form 990, Return of Organization Exempt from Income Tax, only if its gross receipts each year are normally more than \$25,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of the organization's annual accounting period. The law imposes a penalty of \$20 a day, up to a maximum of \$10,000, when a return is filed late, unless there is reasonable cause for the delay.

All exempt organizations (unless specifically excluded) are liable for taxes under the Federal Insurance Contributions Act (social security taxes) on remuneration of \$100 or more paid to each employee during a calendar year. Your organization is not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, these organizations are not automatically exempt from other federal excise taxes.

Donors may deduct contributions to your organization as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to your organization or for its use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Lewis & Clark Humane Society  
81-6014910

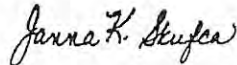
Your organization is not required to file federal income tax returns unless it is subject to the tax on unrelated business income under section 511 of the Code. If your organization is subject to this tax, it must file an income tax return on the Form 990-T, Exempt Organization Business Income Tax Return. In this letter, we are not determining whether any of your organization's present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

Section 6104 of the Internal Revenue Code requires you to make your organization's annual return available for public inspection without charge for three years after the due date of the return. The law also requires organizations that received recognition of exemption on July 15, 1987, or later, to make available for public inspection a copy of the exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. Organizations that received recognition of exemption before July 15, 1987, and had a copy of their exemption application on July 15, 1987, are also required to make available for public inspection a copy of the exemption application, any supporting documents and the exemption letter to any individual who requests such documents in person or in writing. For additional information on disclosure requirements, please refer to Internal Revenue Bulletin 1999 - 17.

Because this letter could help resolve any questions about your organization's exempt status and foundation status, you should keep it with the organization's permanent records.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,



Janna K. Skufca, Director, TE/GE  
Customer Account Services

# Life Houses, Inc.

EIN Number: 264187395

Derek Calvert/Executive Director

P.O. box 758

Helena, MT 59624

Email: derek.calvert@life-houses.org

Telephone: 406-800-1210

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** Life Houses empowers young adults by providing mentorship, guidance, and a nurturing community that fosters personal growth and strong, supportive relationships within a safe living environment

**Description of Project or Program Receiving Funds:** We look to use these funds in support of our Mental health Counseling partnerships. Currently, we are looking at paying for four counseling sessions for each of our residents but this grant would allow us to provide our max of 11 residents 8 counseling sessions, 4 group counseling sessions for both our houses, and essential training for our volunteers and board. The less our residents have to focus on cost, the more they can focus on growing and transitioning towards independence.

**Intended Use of Funds:** Our organization is currently not able to provide a staffing position for counseling services. Due to this we often have to assess our capabilities in serving each individual, and many times we are unable to. We are developing partnerships with counselors in our community to work with our young adults, however, our funds are limited and will only go so far. This grant would allow us to have more flexibility in the residents we accept as we are able to provide more intensive support. Expected outcomes include improved mental health, greater emotional stability, and enhanced readiness for independent living. Impact will be measured through participant self-assessments.

**Brief Budget Summary:** Our overall project is budgeted at \$3920. Broken down by the following:  
\$3080 for individual therapy sessions (88 sessions at \$35 each)  
\$560 for group counseling facilitation and materials  
\$280 for training of volunteers, board, and staff.  
These funds will ensure that our participants receive professional mental health care at no cost to them.



**Expressed Public Benefit to the Residents of Helena:** Through Life Houses mental health support for vulnerable young adults, our program contributes to community well-being by reducing homelessness, unemployment, and crime. Improved mental health leads to better job retention, stronger social connections, and increased self-sufficiency, which benefits the overall community.

Date: **SEP 15 2009**

LIFE HOUSES INC  
C/O KRYSTAL STEWART  
PO BOX 1040  
HELENA, MT 59624

Employer Identification Number:  
26-4187395  
DLN:  
17053223357009  
Contact Person:  
RONALD D BELL ID# 31185  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
December 31  
Public Charity Status:  
509(a) (2)  
Form 990 Required:  
Yes  
Effective Date of Exemption:  
February 10, 2009  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c) (3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c) (3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c) (3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

-2-

LIFE HOUSES INC

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,



Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

# Mending Waters Montana

EIN Number: 45-3506231

Garrett Fawaz - Founder and Board Member

PO Box 1798

Helena, MT 59624

Email: noclearline@hotmail.com

Telephone: 406-461-6661

## **Total Grant Amount: \$600**

Total Amount Requested: \$600

Funding from City: \$0

Funding from County: \$560

Funding from HACF: \$40

**Organization's Mission:** Mending Waters Montana is committed to the holistic recovery of Veterans and active military personnel, achieved through experiences in fly fishing, fly tying, and enriching events that bond people and nature together.

**Description of Project or Program Receiving Funds:** This grant will support Veteran programs that occur within Helena - fly-rod building courses and fly tying courses. Both support programs are core priority activities that MWM conducts throughout the year. The grant will support the purchase of materials for use in the courses. The fly tying course occurs bi-weekly every month. The fly rod building course occurs three times per year. There is no cost to any Veteran participating in any MWM program.

**Intended Use of Funds:** Outcomes: Fly tying and fly rod building have proven to be very positive therapeutic activities for Veterans in their recovery programs. These two therapeutic activities are successfully used throughout the nation by other Veteran organizations. There is a definitive and positive improvement in the Veteran's self-esteem, inner-personal relationship building, camaraderie, and sense of accomplishment.

**Brief Budget Summary:** Funding is used in two support programs: Fly-tying courses and Fly Rod building courses. Budget Line Items:

1. \$400 for fly rod building materials. This would include: fly rod blanks, ferrules, thread, glue, and cork handles. This would provide the ability for 6 Veterans to build their own fly rod.
2. \$200 for fly tying materials that would include: thread, hooks, and tying materials like feathers, dubbing, etc. This would support 6-months worth of tying courses.

**Expressed Public Benefit to the Residents of Helena:** The mental health improvement of our local Veterans and the subsequent improvement of these Veterans' relationships within their families, their community, and their overall quality of life.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **NOV 16 2011**

MONTANA PROJECT HEALING WATERS FLY  
FISHING INC  
C/O JAMES SMITH  
PO BOX 1798  
HELENA, MT 59624

Employer Identification Number:  
45-3506231

DLN:  
17053285305011

Contact Person:  
ROGER W VANCE ID# 31173

Contact Telephone Number:  
(877) 829-5500

Accounting Period Ending:  
December 31

Public Charity Status:  
170(b)(1)(A)(vi)

Form 990 Required:  
Yes

Effective Date of Exemption:  
September 28, 2011

Contribution Deductibility:  
Yes

Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

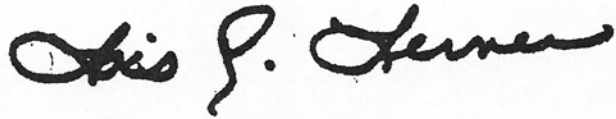
Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

MONTANA PROJECT HEALING WATERS FLY

Sincerely,

A handwritten signature in black ink, appearing to read "Lois G. Lerner". The signature is fluid and cursive, with the first name "Lois" being more prominent and the last name "Lerner" following in a similar style.

Lois G. Lerner  
Director, Exempt Organizations

Enclosure: Publication 4221-PC

# Montana Legal Services Association

EIN Number: 81-0298262

Michelle Potts/Director of Strategic Focus and Development  
616 Helena Avenue Suite 100  
Helena, MT 59601  
Email: mpotts@mtlsa.org  
Telephone: 406-438-3448

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** Montana Legal Services Association's (MLSA) mission is to protect and enhance the civil legal rights of, and promote systemic change for, Montanans living in poverty. As a statewide, nonprofit law firm, MLSA provides free civil (non-criminal) legal aid to thousands of low-income Montanans each year, helping to address a wide range of civil legal problems related to housing, family law, domestic violence, public benefits, consumer debt, and more.

**Description of Project or Program Receiving Funds:** A \$4000 grant from the Helena Area Community Foundation will enable MLSA to purchase four new, reliable laptop computers for MLSA intake staff serving Lewis and Clark County residents living in poverty who are experiencing a civil legal issue. Many civil legal issues, orders of protection in domestic violence cases, evictions, and public benefit reductions, involve foundational human needs, such as safety, shelter, and food. Updating old, deteriorating equipment ensures that MLSA can provide the most efficient and effective service possible for applicants.

**Intended Use of Funds:** In order to reach all low-income Montanans, including those in remote and rural areas, MLSA provides intake and legal services via technology whenever possible. MLSA's Intake staff are on the front line when Helena-area and statewide residents need civil legal assistance. Intake staff are the first staff to interact with applicants and are the staff who will connect applicants to not only MLSA services but also community resources. Old and outdated computer equipment means that some of MLSA's Intake staff struggle with slow and inconsistent computers, which delays legal assistance and adds frustration to clients in dire need. Support from the Helena Area Community Foundation would allow MLSA to purchase four replacement computers to improve Intake staff's ability to work efficiently and quickly. In turn, this will enable more Helena-area residents to receive the legal assistance they need to maintain their safety, remain housed, and to continue to pay their bills. The impact of these funds can be measured in

the number of applicants MLSA is able to connect with, and the number of clients MLSA is able to place for assistance.

**Brief Budget Summary:** MLSA will use the \$4000 towards the purchase of four new Dell computers with a unit price of \$1400 and a total cost of \$5600. MLSA will use other funding sources to cover the remaining cost of \$1600.

**Expressed Public Benefit to the Residents of Helena:** In 2024, MLSA handled 466 cases in Lewis and Clark County, helping to address issues related to family law and domestic violence; housing and evictions; consumer debt; public benefits; and more. Unfortunately, the need for civil legal services in Lewis and Clark County continues to outweigh MLSA's available resources, with 891 Lewis and Clark residents requesting assistance that same year. Improving the efficiency and effectiveness of MLSA's computers will help improve the intake process as a whole, making the intake experience more streamlined for applicants and increasing MLSA's ability to help Lewis and Clark residents address their civil legal needs.





U. S. TREASURY DEPARTMENT  
INTERNAL REVENUE SERVICE

DISTRICT DIRECTOR  
P. O. BOX 1177  
HELENA, MONTANA 59601

FEB 2 - 1967

IN REPLY REFER TO  
Form L-178  
Code 414:ME  
HEI-EO-67-3

Montana Legal Services Association  
Room 608, Power Block  
Helena, Montana 59601

PURPOSE Charitable and Educational	
ADDRESS INQUIRIES & FILE RETURNS WITH DISTRICT DIRECTOR OF INTERNAL REVENUE	
Helena, Montana	
FORM 990-A REQUIRED	ACCOUNTING PERIOD ENDING
<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	June 30

Gentlemen:

On the basis of your stated purposes and the understanding that your operations will continue as evidenced to date or will conform to those proposed in your ruling application, we have concluded that you are exempt from Federal income tax as an organization described in section 501(c)(3) of the Internal Revenue Code. Any changes in operation from those described, or in your character or purposes, must be reported immediately to your District Director for consideration of their effect upon your exempt status. You must also report any change in your name or address.

You are not required to file Federal income tax returns so long as you retain an exempt status, unless you are subject to the tax on unrelated business income imposed by section 511 of the Code, in which event you are required to file Form 990-T. Our determination as to your liability for filing the annual information return, Form 990-A, is set forth above. That return, if required, must be filed on or before the 15th day of the fifth month after the close of your annual accounting period indicated above.

Contributions made to you are deductible by donors as provided in section 170 of the Code. Bequests, legacies, devises, transfers or gifts to or for your use are deductible for Federal estate and gift tax purposes under the provisions of section 2055, 2106 and 2522 of the Code.

You are not liable for the taxes imposed under the Federal Insurance Contributions Act (social security taxes) unless you file a waiver of exemption certificate as provided in such act. You are not liable for the tax imposed under the Federal Unemployment Tax Act. Inquiries about the waiver of exemption certificate for social security taxes should be addressed to this office, as should any questions concerning excise, employment or other Federal taxes.

This is a determination letter.

Very truly yours,

*Nelson L. Seeley*  
Nelson L. Seeley  
District Director

# Montana Living History Program

EIN Number: 261983868

Melony Bruhn, Program Coordinator  
1046 Ray Road  
Helena, MT 59602  
Email: MTHistory@outlook.com  
Telephone: 406-461-8498

## **Total Grant Amount: \$500**

Total Amount Requested: \$500

Funding from City: \$0

Funding from County: \$500

Funding from HACF: \$0

**Organization's Mission:** The Mission of the Montana Living History Program is to Teach the Historic Skills of our Frontier Past and Develop an Appreciation for our Rich, Western Cultural History.

**Description of Project or Program Receiving Funds:** A \$500 grant would allow us to increase the number of hands-on exhibits and exhibitors sharing their knowledge of Homestead Gardening and Food Preservation with the attendees at our 2025 Living History Day. Due to the inflationary nature of our current economy, the need for acquiring skills for self-sufficient food production and preservation has grown dramatically. For the last three years, attendees at our Living History Day have expressed their desire to learn about these skills and how they were implemented by our pioneer forefathers. With additional funding we could build the infrastructure for holding the demonstrations of gardening, fermentation, canning, drying and other forms of food independence.

**Intended Use of Funds:** Our organization provides education about historic skills that could benefit the people of today. We take pride in adding new areas of interest to our annual Living History Day. Providing a Homesteading component that focuses on Food Self-Sufficiency will be adding a needed and welcomed addition to our list of educational opportunities. We expect the outcomes of this grant to be exposing over 750 event attendees to the possibilities of reducing reliance on outside sources for food security. We measure the success of our annual Living History Day by asking our attendees to fill out a form rating the individual exhibits at our event.

**Brief Budget Summary:** \$500 in funding would be used for lumber, screws and metal to build four stations where skilled teachers would show Living History Day attendees how to 1. Dry food 2. Ferment food 3. Can food and 4. Smoke/Salt food. These stations would be able to be dismantled and stored for use next year, and the years thereafter.

**Expressed Public Benefit to the Residents of Helena:** With rising inflation, more families are having to look for assistance with food security. By learning the skills to garden and preserve food, they can become less reliant on outside assistance and more independent in their choices.

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

9-18-2010

Date: **SEP 18 2010**

THE MONTANA LIVING HISTORY PROGRAM  
C/O PENNY HARRISON  
PO BOX 9624  
HELENA, MT 59604

Employer Identification Number:  
26-1983868

DLN:  
17053238317030

Contact Person:  
LISA M VAN DER SLUYS ID# 95264

Contact Telephone Number:  
(877) 829-5500

Accounting Period Ending:  
December 31

Public Charity Status:  
170(b)(1)(A)(vi)

Form 990 Required:  
Yes

Effective Date of Exemption:  
May 13, 2010

Contribution Deductibility:  
Yes

Addendum Applies:  
No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

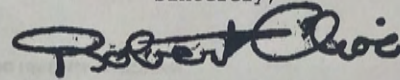
Please see enclosed Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, for some helpful information about your responsibilities as an exempt organization.

Letter 947 (DO/CG)

THE MONTANA LIVING HISTORY PROGRAM

We have sent a copy of this letter to your representative as indicated in your power of attorney.

Sincerely,

A handwritten signature in dark ink, appearing to read "Robert Choi". The signature is stylized with a large, looped "R" and a cursive "Choi".

Robert Choi  
Director, Exempt Organizations  
Rulings and Agreements

Enclosure: Publication 4221-PC

# Myrna Loy

EIN Number: 51-0185430

Benji Cosgrove Executive Director  
15 N Ewing St.  
Helena, MT 59601  
Email: benji.cosgrove@themyrnaloy.com  
Telephone: 406-443-0287

## **Total Grant Amount: \$3,350**

Total Amount Requested: \$3,350

Funding from City: \$2,000

Funding from County: \$0

Funding from HACF: \$1,350

**Organization's Mission:** The Myrna Loy inspires the creative spirit of central Montanans by presenting innovative films, live performances, and other arts; supports local artists in their work; and fosters a lifelong love of the arts through education and enrichment for all people. The Myrna Loy amplifies voices of color, of Indigenous cultures, of LGBTQ+ humans, and all those who enliven our humanity. This community-fired culture center brings the arts into the center of community and civic life.

**Description of Project or Program Receiving Funds:** Helena's urban Indigenous community always struggles for recognition and a sense of belonging in our 94%-white community. Because of this, The Myrna Loy continues to spearhead a unique community celebration during the week of Montana Indian Heritage Day (last Friday of September). This year, the Myrna Loy is partnering with the Helena Indian Alliance, OPI Indian Education, and AARP Montana to provide two nights of programming for our Indian Heritage Day celebration. This grant would help offset film rentals and performance fees so that we can continue to offer low-cost community events that celebrate Indigenous voices and raise awareness about their importance to the Helena community.

For this celebration, The Myrna Loy will offer an Indigenous film festival on Wednesday night followed by a standup comedy performance on Thursday night. The film festival will feature short films produced by and about Montana's Indigenous peoples. Our standup show will feature two Indigenous comics from Montana: Kasey Nicholson (Blackfeet) and Donovan "Beef" Archambault (Assiniboine). Aside from an exciting night of unique comedy from an Indigenous perspective, Comic Kasey Nicholson : who is also a noted motivational and public health speaker : will visit Helena schools to talk to students about his trajectory from his Fort Belknap childhood to the Seattle performance scene, and how he melds his traditions with his successful public career.

As Helena's premiere arts/culture center, it's vital that The Myrna Loy celebrate all cultures in Helena, particularly those which are under-represented but so important to our region. This annual celebration of Indigenous culture has become a tradition for The Myrna and one of our most vital, joyous, and meaningful projects every year.

**Intended Use of Funds:** This grant will make these important events financially viable for The Myrna Loy as we continue to grow them into sustainable community celebrations. Between film rights, staffing, performance fees, speaking fees and the loss of our typical film revenue, this grant would afford us the flexibility to offer these events at reduced ticket prices for people of all ages and demographics.

Our goals are: To give Helenans of all ages opportunities to engage with Montana Indigenous culture and arts in new ways; to raise public awareness of the varied and powerful contributions to Montana by Indigenous artists; and to strengthen our relationships with Indigenous organizations and support their art in Montana.

**Brief Budget Summary:** Total Cost for project: \$9,820

Standup Comic fees - \$7,000

Film Screening fees - \$1,250

Travel / Hotels - \$500

Production and marketing - \$750

Extra Staffing - \$350

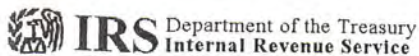
To keep ticket prices low, our projected Income from the two ticketed events (Indigenous Standup and Indigenous Film Festival) is approximately \$4,500. We have a tentative sponsorship from AARP for \$2,000. We would be seeking the remaining \$3,350 from HACF.

**Expressed Public Benefit to the Residents of Helena:** It benefits all of Helena to experience and participate in our shared history and heritage as Montanans. We believe that creating diverse, accessible events like film festivals, comedy shows, and school appearances, helps people of all ages come to appreciate and understand our Native cultures in new ways.

It also greatly benefits the Helena population of urban Indians, by bringing artists and films to Helena from around the state -- giving them a chance to reconnect with their culture.

Our Indian Heritage celebration supports Native artists while offering the Helena community the chance to experience these traditions and perspectives in exciting new ways.





Department of the Treasury  
Internal Revenue Service

P.O. Box 2508, Room 4010  
Cincinnati OH 45201

In reply refer to: 4077394588  
June 27, 2019 LTR 4168C 0  
51-0185430 000000 00

00040867

BODC: TE

THE MYRNA LOY  
MYRNA LOY CENTER  
15 N EWING ST  
HELENA MT 59601



033917

Employer ID number: 51-0185430  
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated Apr. 23, 2019, about your tax-exempt status.

We issued you a determination letter in April 1976, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(i).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m.,



# **Plymouth Congregational Church – United Church of Christ, Helena**

EIN Number: 81-0298891

Jennifer Jeffries Thompson - Outreach and Social Justice Committee  
400 S. Oakes  
Helena, MT 59601  
Email: jennifer.j.thompson.mt@gmail.com  
Telephone: 406-442-2642

## **Total Grant Amount: \$653**

Total Amount Requested: \$653

Funding from City: \$500

Funding from County: \$0

Funding from HACF: \$153

**Organization's Mission:** Plymouth's Mission is to nurture our congregation and the wider community with acts of love and a vision of God's image in all things.

**Description of Project or Program Receiving Funds:** The purpose of this project is to encourage reading about and discussion of an important topic: global warming. It has been said that among the obstacles to meaningful discussion on the subject are complacency, fear, political polarization and ignorance. Encouraging a safe and accepting environment in addition to featuring well-informed and authoritative speakers is our goal. A measurable means to better achieve this goal is to recommend and provide good, well-researched and trusted publications about the topic. If successful this small grant enables the purchase of books for those who are interested and would like to be better prepared before attending the five, free community discussions. Providing a collection of books demonstrates three things: it encourages scholarship; it reminds participants that the sponsors are serious in their intent to support a well-researched conversation about global warming; and it levels the opportunity for anyone to participate, regardless of financial standing.

**Intended Use of Funds:** Important problems don't get fixed until ordinary people mobilize. Plymouth Church has recognized the thin overlap of contemporary challenges with the call of faithful imperatives for many years. Whether Christian, Jewish, Buddhist, Islamic, prominent faith traditions advocate for the care and protection of the earth. Even so there is resistance to engage in discussions of global warming, most particularly because the obstacles to lasting fixes seem overwhelming. The bad-news warnings are more likely to make people checkout rather than change. A reading and public presentation program such as the one proposed will help not only Plymouth progress, but create a manageable, non-threatening opportunity for folks living in the Helena area to learn more. Because the program is free; because it is provided over the noon hour

in rotating locations throughout town; because the speakers are authoritative and respected; and because collaborative associations with non-profit partners can be identified in supporting this effort, we expect good attendance, fair exchange, and a willingness to move forward. We can measure impact through attendance figures, comments, and coverage from local media. Perhaps the greatest measurable impact would be to hear we need more discussion.

**Brief Budget Summary:** The funds requested will be used to purchase 30 copies of a recent publication titled "Saving Us: A Climate Scientist's Case for Hope and Healing in a Divided World" by Katherine Hayhoe. The book, a description of global warming and how there is a role for ordinary people to become involved in addressing this crisis, is the focus of a Helena-area book read and discussion offered in the fall 2025. The book (paperback) sells for \$20.99. In a similar public program two years ago when we focused on the unsheltered and housing concerns, we featured "Rough Sleepers" and ordered 30 copies. Each week, for five weeks, more than 100 people participated in the sessions discussing themes outlined in the book. We hope that this series will be met with equal interest; we feel 30 copies is appropriate. In addition we request \$23.90 to purchase two copies of a study guide, a companion piece to "The Future We Choose: Surviving the Climate Crisis" by Christiana Figueres and Tom Rivet-Carnac (\$11.95 x 2). Based on previous experience, at the conclusion of the book read and discussion, the returned copies of the featured book will be donated to other non-profit organizations, not limited to churches, who have expressed interest in replicating the program.

**Expressed Public Benefit to the Residents of Helena:** Community matters. Whatever our civic or cultural challenge, getting together with respect and openness is the beginning of change. Global Warming is not just for consideration in halls of higher learning, but also on the streets, at home, in restaurants, in parks and on trails. Meaningful conversations take place wherever a group assembles. As residents of the broader Helena area, we are blessed by daily reminders of the beauty and wealth of our environment. We are also enriched by an amazing cadre of informed and educated professionals from whom we have much to learn. Whether alarmed, cautious, doubtful or dismissive, residents of our great community have a chance to engage and learn.



February 27, 2018

Plymouth Congregational UCC  
400 S. Oakes St.  
Helena, MT 59601

To Whom It May Concern:

This is to inform you that Plymouth Congregational UCC 400 S. Oakes St. Helena, MT 59601 is in the 2016 Yearbook of the United Church of Christ on page 443 of the denomination known as the United Church of Christ. A copy of the current Yearbook page which includes this church is attached for your reference.

The denomination of which the organization named above is a member, carries a group exemption under 501(c)(3). The group exemption number is 1665 and the denomination carries tax identification number 13-1957221. The organization named above is responsible for any and all payroll or other tax reporting and filings under its own separate tax identification number.

In the attached letter which confirms the group exemption, it is held that the conferences, associations, synods, councils, and educational, charitable and religious organizations listed in the Yearbook are exempt from federal income tax as organizations described in Section 501(c)(3) of the Internal Revenue Code of 1954. Currently, the United Church of Christ does not provide annual Yearbook information to the IRS in compliance with page three, item one of the ruling per the second attached letter, dated June 30, 2006 which states: "Because you are a church organization, you are not required to submit the annual updates to your subordinate listing." Annual updates to the attached letters are not required.

Should you have any additional questions or concerns, please feel free to contact me at 216-736-1807 or via e-mail at [Joness@ucc.org](mailto:Joness@ucc.org).

Sincerely,

A handwritten signature in blue ink, appearing to read 'Stephen W. Jones', written over a blue circular stamp.

Stephen W. Jones  
Chief Financial Officer

Attachments

OGDEN UT 84201-0038

In reply refer to: 0441970785  
Mar. 23, 2011 LTR 4168C EO  
13-1957221 000000 00  
00029704  
BODC: TE

UNITED CHURCH OF CHRIST  
700 PROSPECT AVE E  
CLEVELAND OH 44115-1100



013419

Employer Identification Number: 13-1957221  
Person to Contact: EO Accounts  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Mar. 14, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in June 1964.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(i).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0441970785  
Mar. 23, 2011 LTR 4168C E0  
13-1957221 000000 00  
00029705

UNITED CHURCH OF CHRIST  
700 PROSPECT AVE E  
CLEVELAND OH 44115-1100

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Rita A. Leete  
Accounts Management II

# Rocky Mountain Development Council, Inc.

EIN Number: 81-0296458

Kathy Marks

PO Box 1717

Helena, MT 59624

Email: kmarks@rmdc.net

Telephone: 406-447-1680

## **Total Grant Amount: \$2,000**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$0

**Organization's Mission:** Rocky Mountain Development Council, Inc. strives to improve quality of life and promote self-sufficiency for individuals and families.

**Description of Project or Program Receiving Funds:** Rocky has two federal grants that were not re-authorized and are in peril of not being renewed. The most important grant comes from the Older Americans Act that provides for Meals on Wheels in our area. Without the federal money or the addition of new money, we will have to put seniors on a waiting list. Rocky has always been able to feed everyone who needs a meal. Our request is for additional money for the Meals on Wheels Program.

**Intended Use of Funds:** This small grant will help us continue the Meals on Wheels Program as we maneuver through the unknowns of a new federal budget or continuing renewal of the present budget. We keep data on every meal served and will be able to measure the impact of additional funds by the number of clients served.

**Brief Budget Summary:** The primary goal of the Meals-on-Wheels Program (MOW) is to promote the health of seniors in the tri-county area by providing them with hot nutritious meals that meets a minimum of one-third of their daily dietary needs as described by the U.S. Department of Agriculture. MOW provides nutritious food, warm conversation and regular safety checks to hungry seniors. This goal corresponds with the mission of the Older Americans Act, which is to foster independence among our nation's elderly and to prevent the unnecessary and often costly need for institutionalization. One way the Senior Nutrition Program endeavors to fulfill the mission is to offer home-delivered meals in both the urban and rural communities in the tri-county area. Meals-on-Wheels meals are served five days per week to seniors in Augusta, Helena, Lincoln, Whitehall, East Helena, and Townsend. In Boulder, meals are served two times per week. Home-delivered nutrition services enable older adults to remain in their homes and community. The program also

impacts the community by linking seniors to community services that allow them to remain independent.

Funds will be used for salaries (cooks, administration, and one paid meal delivery person), groceries, gas for the MOW vehicle, and trays used to package the meals.

**Expressed Public Benefit to the Residents of Helena:** In 2024, Rocky's Meals on Wheels (MOW) program delivered 93,679 meals to homebound seniors aged 60 and over across Lewis and Clark, Broadwater, and Jefferson Counties. But MOW is more than just a meal. The friendly visits from our volunteers help keep seniors connected, safe, and supported, making a positive difference in their lives.



Internal Revenue Service

Department of the Treasury

District  
Director

RECEIVED

AUG 21 1995

R M D C

ROCKY MOUNTAIN DEVELOPMENT  
COUNCIL INC  
PO BOX 1717  
HELENA, MT 59624-1717

Person to Contact: EO:TPA

Telephone Number:  
1-800-829-1040  
312-435-1040

Refer Reply to: 95-2558

Date: August 16, 1995

RE: EXEMPT STATUS  
EIN: 81-0296458

This is in response to the letter, dated August 11, 1995, regarding your status as an organization exempt from Federal income tax.

Our records indicate that a ruling letter was issued in April 1986 granting your organization an exemption from Federal income tax under the provisions of Section 501(c)(3) of the Internal Revenue Code of 1954. Our records also indicate that your organization is not a private foundation but one that is described in Section 509(a)(1) & 170(b)(1)(A)(vi) of the Internal Revenue Code.

Contributions made to you are deductible by donors in computing their taxable income in the manner and to the extent provided in Section 170 of the Internal Revenue Code.

If your gross receipts each year are normally \$25,000 or more, you are required to file Form 990, Return of Organizations Exempt from Income tax by the fifteenth day of the fifth month after the end of your annual accounting period.

You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under Section 511 of the Code. If you are subject to this tax, you must file an income tax return on F-990-T.

If any question arises with respect to your status for Federal income tax purposes, you may use this letter as evidence of your exemption.

This is an advisory letter.

Sincerely yours,

*for Cynthia Lynn*  
Robert W. Brock  
District Director



# St. Peter's Health Foundation

EIN Number: 81-0392270

Elizabeth Warner  
2475 Broadway  
Helena, MT 59601  
Email: eawarner@sphealth.org  
Telephone: 406-444-2370

## **Total Grant Amount: \$2,995**

Total Amount Requested: \$2,995

Funding from City: \$2,000

Funding from County: \$0

Funding from HACF: \$995

**Organization's Mission:** To inspire a culture of giving that supports exceptional and compassionate care for our community's health and well-being.

**Description of Project or Program Receiving Funds:** Grant support in the amount of \$2,995 will be used to purchase a Bike Rodeo Essentials Course Kit to be used at the annual St. Peter's Health Bike Rodeo. The equipment will be used at bike rodeo events for years to come.

The kit contains the equipment needed to set up and conduct three complete bike riding skills courses (a variety of cones and posts) kid-friendly signage, chalks and materials to set up: 1. Rules of the Road, 2. Obstacle Course and 3. Merge/Door Zone. These materials will be used for years to come and is a key component to helping kids develop the skills they need to ride safely and confidently in real-world traffic conditions.

In partnership with the St. Peter's Health Emergency Center and the Trauma and Injury Prevention Teams, St. Peter's Health will host a free outdoor Bike Rodeo for kids age 5 to 15, their caregivers and parents on May 31, 2025 on the Hospital campus. Event attendance is anticipated to be 100 - 150 families.

This event aims to help keep young bike riders safe on our streets and hills by teaching key safety skills, promoting head injury prevention helmet use and proper helmet fit, and providing certificates to all kids who successfully complete the three skills courses.

Activities at the event will include: Free bike helmet fit checks, free bike helmets for children in-need, free bike inspections, meet a firefighter, police officer and paramedic opportunities and the opportunity to climb in and sit in a fire truck, police car, or ambulance, three bike skill courses, community partner tables, and additional accident prevention and safety information.

Additional Community partners include : Helena public school district, Lewis and Clarke County Library, Clancy school district, East Helena school district, Montana City school district, Helena Police department, Helena Fire department, Brain Injury Alliance, St. Peter's Physician Partners, St. Peter's Association, Bike Walk Montana, The Montana Bicycle Guild, Safer Communities Montana, and several Helena bicycle clubs and retailers.

**Intended Use of Funds:** St. Peter's Health relies on philanthropic contributions and partnerships to provide no-fee community outreach events and activities to educate and promote accident prevention and brain injury prevention in our Helena community.

The attendance goal for the event is: 100 - 150 youth and their families. We will track attendance, and the number of kids who complete the rodeo bike skills courses and earn certificates, and follow-up with a post-event email survey to families who attended for feedback and additional educational reminders.

Additional 1: 1 outreach by St. Peter's Accident Prevention Coordinator to individual schools in Helena, providing small group biking skills education and helmet awareness will be conducted throughout the school year. These too will be tracked.

The skills course will ensure that kids are safer and know the rules of the road. Biking is a popular sport in Helena and providing youth with an opportunity to learn essential life-long biking skills and understand the importance of wearing a helmet, the safer they and our community will be well into the future.

St. Peter's Health Emergency Center is certified as a Level III Trauma Center. As part of the Level III certification, community outreach education that addresses the top three accident types treated in the emergency center is required. St. Peter's Health tracks accidents treated in the emergency room and in 2024, the top three categories of accidents: 1. Accidents with helmet recommendation (head and face injuries preventable by helmet use) primarily: biking, e-bike, skateboarding, ATV, dirt bike activities. 2. Car accidents and 3. Falls - especially in our elderly population.

Over a six month period (July 2024 - Dec 2024) 70 patients were treated for Accidents with Helmet Recommendations.

An outcome of the grant support is that it will help support the continued Trauma Center Level III certification requirement, helping to ensure that our community has high level emergency department services available when needed most.

**Brief Budget Summary:** The St. Peter's Health Bike Rodeo Event Budget is \$17,500.

Total amount raised to date: \$14,496.00

Total remaining left to raise: \$3,004.00

St. Peter's Health has allocated \$11,194, St. Peter's Physician Partners has granted \$2,000 and St. Peter's Association has granted \$1,000, for a total \$14,194.

**Bike Rodeo Event Expense Budget:**

Event signage and marketing \$1,952.00

Eight port-a-potty and four hand washing station rentals \$2,960.00

Registration tent and activity tables: 221.00

Water station \$150.00

60 children's bike helmets: \$1,001.00

First aid station tent, medical supplies and EMT time: \$302.00

Safety give-a-way: \$498.00

Injury Prevention Coordinator, Trauma Coordinator, Environmental Services and Maintenance staff time for planning, outreach, set-up, execution, and tear down: \$7,412.00

Bike Rodeo Essentials Course Kit: \$2,995

St. Peter's Health is a nonprofit health system serving the Helena community. With a current operating budget of \$311,580,000 the health system is projected to end the fiscal year at break even or slightly negative margin. Financial challenges are driven by rising labor, pharmaceuticals and supplies, inadequate reimbursement rates for Medicaid and Medicare patients and uninsured patient costs. This phenomenon is impacting nonprofit hospitals across the country and disproportionately impacting nonprofit rural health systems like St. Peter's Health.

While committed to collaborating with the community to improve health outcomes and partner for preventative health strategies, St. Peter's Health relies on philanthropy from individuals, and private and government grants to assist with outreach initiatives and events.

**Expressed Public Benefit to the Residents of Helena:** Hundreds of young children and their families in our community will learn essential bike riding skills, understand the importance of wearing a helmet and meet and interact with our community's safety officers and first responders in a fun, free, community event. The project will also support an important certification requirement for our community's Level III Emergency Center that serves all residents.

Kids and families will have an opportunity to engage with a number of other safety related and accident prevention messages from community partner organizations through information tables and activities.

And because the event will be promoted across the community, to the schools in Clancy, Helena, East Helena and Montana City, through the Lewis and Clarke County Library, at our Helene Biking retailers, safety organizations and biking clubs, it will reinforce and highlight our community's commitment to the safety of our children and young families.



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
PO Box 2508  
Cincinnati, OH 45201

ST PETERS HEALTH FOUNDATION  
% STEPHEN MASON  
2500 E BROADWAY ST  
HELENA, MT 59601

Date:  
June 27, 2022  
Employer ID number:  
81-0392270  
Form 990 required:  
990, YES  
Person to contact:  
Name: E Kramer  
ID number: 1002988929

Dear Sir or Madam:

We're responding to your request dated August 27, 2021, about your tax-exempt status.

We issued you a determination letter in July 1981, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations  
Rulings and Agreements

# Tri-County Firesafe Working Group

EIN Number: 47-5387650

Lois Olsen  
PO Box 934  
Helena, MT 59624  
Email: president@tcfswg.org  
Telephone: 406-459-2542

## **Total Grant Amount: \$3,000**

Total Amount Requested: \$3,000

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$2,000

**Organization's Mission:** The mission of Tri-County Fire Safe Working Group (TCFSWG) is to preserve and enhance the area's natural and manmade resources through a collaborative effort by mobilizing both public and private sectors to make homes, businesses, properties, neighborhoods, communities, and the landscape more fire safe.

TCFSWG also addresses safety issues such as wildfire prevention, hazardous fuel mitigation, structure and infrastructure protection, emergency preparedness, and response and evacuation planning.

**Description of Project or Program Receiving Funds:** The service area for TCFSWG includes Broadwater, Jefferson and Lewis & Clark County, and the City of Helena. Large portions of these areas have high wildfire risk and the potential for devastating damages from wildfire. Our objective is to provide people with information and cost-share grants to help them protect their homes by removing combustible materials and managing properties to resist wildfire. We request funding to create an educational video describing the history of wildfires in our service area, current concepts of wildfire behavior, and specific steps to make homes and property more fire-safe. We also want to provide safety measures that would help people understand what to do in the case of a wildfire and the importance of early evacuation.

The video content will describe the services our program provides, including grant-funded home ignition zone assessments, fuel prescriptions for individual properties, and options for cost-share funding for fuel mitigation on private property. We previously developed an informational video titled "Are You Wildfire Ready?" using grant funding from the City of Helena-Firesafe Helena. That video provides a broad background on wildfires at the urban interface and describes the potential danger wildfires pose to the City of Helena. The second half of the video describes how our organization can help people determine how to make their property safer and shows examples of wildfire mitigation projects. This video is currently being digitally distributed via our website

(tcfswg.org) and is shown as part of our presentations at public meetings. The funding requested from Helena Community Foundation will expand on the ideas in that video, focusing on wildfire history and recent research in wildfire behavior that applies explicitly to wildfire risk in the greater Helena area.

**Intended Use of Funds:** This grant would fund 20% of the total cost of the video. We will use matching funds from various sources to reach the full cost of producing a compelling educational video. We have had positive feedback on the "Are You Wildfire Ready" video, with viewers asking whether we have a similar program for Lewis and Clark County. We have such a program and believe an additional video with a broader message will provide needed information to a wider audience. We will distribute this video by posting it on our website, Instagram, and YouTube. These distribution outlets enable us to measure the number of views, assess the comments, and determine the impact of the video.

As part of our conversations with fuel mitigation grant applicants, we ask each applicant to tell us how they heard about our program, which allows us to track the effectiveness of our advertising and products. The benefits of educational videos are concise explanations of basic wildfire information and a greater understanding of our wildfire environment. We intend this information to lead more people in our community to seek out wildfire mitigation options, including those offered through our program, to help improve wildfire safety on their property.

**Brief Budget Summary:** This request will match funding from the Bureau of Land Management (BLM), Montana Department of Natural Resources and Conservation (DNRC), and other grantors for the full cost of the video, estimated at \$14,600 for a 10-minute video. We will combine the funds from this grant with other funding sources to capture video footage, edit videos to convey a thoughtful message and create educational audio to complement the video footage. Funds from this grant would be paid directly to the video producer and not be used for any other program overhead costs. The video participants are volunteers, the outside footage used for the video will be donated, and the video settings will be free of charge. TCFSWG will not charge indirect fees or contract fees to this fund.

**Expressed Public Benefit to the Residents of Helena:** The wildland-urban interface is defined as areas where people live in and adjacent to forests, shrublands, and other wildland areas. The wildfire hazard ratings within Lewis and Clark County based on acreage of landcover types are 29% extreme, 36% high, 15% moderate, and 20% low wildfire hazard ratings. The video developed with this grant will educate people about the potential for wildfire near their property and provide potential steps to improve wildfire safety. The information in the video will present ideas on how they can implement themselves and access programs such as ours that are available to help them. This video supplements the "Are you Wildfire Ready" video by explaining the historical and present wildfire situation in the Helena area and how our program can help protect their property. The devastation that wildfire causes in communities and to families was evidenced tragically during the recent LA fires and is unfortunately repeated every fire season across the

West. Any measures we can take to help prevent wildfire ignition, or spread are critical steps to reducing property damage and increasing public safety.



INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JAN 11 2018

TRI-COUNTY FIRESAFE WORKING GROUP  
INC  
PO BOX 934  
HELENA, MT 59624

Employer Identification Number:  
47-5387650  
DLN:  
17053279312047  
Contact Person:  
JOSEPH LAUX ID# 31077  
Contact Telephone Number:  
(877) 829-5500  
Accounting Period Ending:  
June 30  
Public Charity Status:  
170(b)(1)(A)(vi)  
Form 990/990-EZ/990-N Required:  
Yes  
Effective Date of Exemption:  
October 1, 2015  
Contribution Deductibility:  
Yes  
Addendum Applies:  
No

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to [www.irs.gov/charities](http://www.irs.gov/charities). Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Letter 947



# United Way of the Lewis & Clark Area

EIN Number: 81-6017354

Emily McVey

75 E Lyndale Avenue

Helena, MT 59601

Email: [emily@unitedwaylca.org](mailto:emily@unitedwaylca.org)

Telephone: 406-442-4360

## **Total Grant Amount: \$4,000**

Total Amount Requested: \$4,000

Funding from City: \$2,000

Funding from County: \$0

Funding from HACF: \$2,000

**Organization's Mission:** Uniting resources, organizations, and people to transform our community for good.

**Description of Project or Program Receiving Funds:** The United Way of the Lewis and Clark Area seeks to localize the 211-community resource directory by creating an interactive snap app. (example <https://live.smart1snap.com/buckeyelake>). This app will be an easy-to-use resource for people to use to find community resources in the Helena area. The app will have 5-7 tabs, each tab will have an overarching resource or community need. There will be a map of the Helena area in the tab with the available resources in that tab with a brief description of the resource the location, phone number and website of the organization. This app will allow local organizations that might not qualify to put their information on the 211 site to share information with the community. This app will help community members locate resources in a more efficient way.

**Intended Use of Funds:** This grant will help us build this interactive app. We currently support the efforts of Montana 211 without any funding support. If we want to expand our efforts in this area, we will need to find donor or grant funds. The idea for this app came out of a community meeting where it was suggested that we bring a more localized component to the community resource efforts. While most people want to build a directory that is a wasted effort because printed materials need constant change. Having an easy to use, interactive map with directions, links to websites, easy to click connections to call organizations will allow people immediate access to the resources they need. Updates to the app will be quick and easy if an organization moves or if a program changes. We will continue to make the Helena Resource Advocate Card as long as people request it. Additionally, we will create a business card with the 211, 988 information and a QR code for the snap app for easy distribution.

We would expect to see a higher usage rate of this app than we see with the traditional 211 call center and website. We also anticipate seeing more local organizations participating in this

system because we can create different, less restrictive criteria for who can be in the app. The app can track the number of users and how long they stay on each page. We will work with our local partners to find a way to track if people are finding their services through this app, 211 or other resources.

**Brief Budget Summary:** The cost of building the app is \$1250 for a 7-page app. It will cost \$125 per month to maintain the site. We are asking for the cost to set up the site and maintain it for 22 months.

**Expressed Public Benefit to the Residents of Helena:** This app will make the community resources much easier for people to access. It will require a phone and internet connection but even our unsheltered community has access to those resources if they connect to Wi-Fi at local restaurants or the library. This app puts all of the Helena resources in one place, so people don't need to sift through the Montana 211 site or discover the other online resources to find what they need.



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248219411  
Mar. 15, 2011 LTR 4168C E0  
81-6017354 000000 00

00011120

BODC: TE

UNITED WAY OF THE LEWIS AND CLARK  
AREA  
% TIM MCCAULEY  
PO BOX 862  
HELENA MT 59624-0862



019537

Employer Identification Number: 81-6017354  
Person to Contact: Laura Botkin  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Mar. 04, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1966.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

# West Mont

EIN Number: 81-0402506

Grants and Development Coordinator  
2708 Bozeman Ave.  
Helena, MT 59601  
Email: [jobrecht@westmont.org](mailto:jobrecht@westmont.org)  
Telephone: 406-447-3109

## **Total Grant Amount: \$2,300**

Total Amount Requested: \$2,300

Funding from City: \$0

Funding from County: \$2,000

Funding from HACF: \$300

**Organization's Mission:** Empowering people to succeed by promoting dignity, ability, and independence.

**Description of Project or Program Receiving Funds:** This grant will help us to expand our farm vocational program to once again raise more than one single produce item. Specifically, it will allow us to purchase a high quality soil (Berger BM8) that will enable us to grow a larger variety of produce, and effectively retain water in the growing process. In past years we have had to reduce the variety of our produce, and the amount of produce we are able to grow because of our lack of access to and ability to purchase this soil. This larger variety of produce will also enable us to start (pending a successful harvest) our first ever CSA program where we will be able to provide a fresh and local option for produce in the Helena area. The farm vocational program currently employs 28 adults with disabilities who are instrumental in growing, caring for, and selling all produce at the farm.

**Intended Use of Funds:** There are two main outcomes that we expect from this grant. The first is the successful launch of our annual CSA program. With the purchase of a high quality soil, we anticipate we will have the ability to provide weekly produce baskets for the community for at least 8-10 weeks. The second is the continued expansion of our farm vocational program. This program currently employs 27 individuals with disabilities. We anticipate that with the successful expansion of our produce production, we would be able to add at least 5 more clients in the upcoming year. This would mean providing meaningful and empowering work for folks with disabilities who continue to be interested in being involved in a farm-type setting.

**Brief Budget Summary:** The \$2300 that we are requesting will specifically be used to purchase 60 bales of Berger BM8 soil from Oak Gardens nursery in Belgrade, MT. These bales will cost us

\$38 per bale. They will be the backbone of our produce operation, and the core media that will be used by our clients to successfully grow and care for our produce.

**Expressed Public Benefit to the Residents of Helena:** It will create another fresh produce option in the community during a time in which grocery prices are higher than typical, and supply chains may be interrupted for a variety of different reasons. It would also benefit residents who are individuals with disabilities by creating more job options that are accessible, inclusive, and empowering.



Department of the Treasury  
Internal Revenue Service  
Cincinnati Service Center  
CINCINNATI OH 45999-0038

In reply refer to: 0256554941  
Jan. 28, 2020 LTR 4168C 0  
81-0402506 000000 00  
00012722  
BODC: TE

WEST MONT  
2708 BOZEMAN AVE  
HELENA MT 59601

055901

Employer ID number: 81-0402506  
Form 990 required: Y

Dear Taxpayer:

We're responding to your request dated Jan. 21, 2020, about your tax-exempt status.

We issued you a determination letter in July 1984, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(03).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Section 509(a)(2).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period:

- Form 990, Return of Organization Exempt From Income Tax
- Form 990EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990-EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific

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Jan. 28, 2020 LTR 4168C 0  
81-0402506 000000 00  
00012723

WEST MONT  
2708 BOZEMAN AVE  
HELENA MT 59601

time).

Thank you for your cooperation.

Sincerely yours,



Steve M. Brown, Operations Manager  
Operations 3-CIN



# Wild Montana

EIN Number: 51-0198932

Haley Eakin, Foundations Manager  
80 S Warren St  
Helena, MT 59601  
Email: [heakin@wildmontana.org](mailto:heakin@wildmontana.org)  
Telephone: 406-443-7350

## **Total Grant Amount: \$1,470**

Total Amount Requested: \$4,000

Funding from City: \$0

Funding from County: \$1,470

Funding from HACF: \$0

**Organization's Mission:** Uniting and mobilizing communities to keep Montana wild.

**Description of Project or Program Receiving Funds:** Wild Montana will leverage a grant from the Helena Area Community Foundation to lead three multi-day day trail stewardship projects and two single-day stewardship outings improving trails benefiting residents of Lewis and Clark County during the summer of 2025, improving the safety and accessibility of approximately 15 miles of four popular area trails and providing 40 community members : from teens and parents to recent retirees and young professionals : with a meaningful volunteer experience that connects them to public lands and each other, learn about local history and ecology, build valuable career skills in trail maintenance, and experience the health and wellness benefits of outdoor recreation all while getting their hands dirty improving trails.

Wild Montana's trail stewardship program is core to our mission of uniting people to keep Montana wild. As one of the primary gateways by which we engage new people in our work and foster their commitment to protecting Montana's public lands, this project is a top priority for our organization.

With the support of the Helena Area Community Foundation, we will implement stewardship projects to improve four trails heavily used by and benefitting residents of Lewis and Clark County this summer:

1. MacDonald Pass, Helena Lewis & Clark NF, Continental Divide National Scenic Trail (CDNST). This project will improve 1.5 miles of trail and address erosion and drainage issues located two miles south of MacDonald pass on the CDNST. The project area has undergone extensive fuels reduction work over the past several years. As a result of those treatments, the trail has been obliterated in places and is in need of restoration work. This is a popular section of the CDNST that is easily accessible from Helena and frequently used by hikers and mountain bikers.



2. South Fork Teton, Helena Lewis & Clark NF, trails #165 & #184. Through this project, we will maintain and improve the trail to Headquarters Pass, which is a major access portal trail into the Bob Marshall Wilderness. While out there, we'll also maintain the trail to Our Lake, which is a popular day hike to a scenic alpine lake. Both trails will receive general maintenance - removing blowdown, clearing brush and cleaning drains- improving 6 total miles of trail. The project will take place early in the summer in order to get it in tip-top shape for summer horse riders and hiker traffic.

3. Thunderbolt Creek, Beaverhead Deerlodge NF, trail# 65. The thunderbolt trail is located just west of the town of Basin in the Boulder mountains. It provides access to the CDNST and is popular among mountain bikers and hikers. This trail has several turnpikes that need rehabilitation as well as a myriad of drains that need cleaning. There is a wide variety of trail work with this project including tread rehab, brushing, drain maintenance, and turnpike rehabilitation. We will improve 4 miles of trail on this project.

4. Kading trail, Helena Lewis & Clark NF. The Kading trail was constructed in 2019 by a collaboration of Helena area horse riders, mountain bikers, and hikers. Since then, the Helena Chapter of Wild Montana has "adopted" the trail to perform annual maintenance twice a year. The chapter crew removes blowdown, clears brush, and performs sport retread where needed along the 3.5-mile length of the trail.

Collectively, these efforts will provide meaningful local volunteer and education opportunities, while improving cherished trail systems that will benefit Lewis and Clark County residents for years to come.

**Intended Use of Funds:** Volunteer Trail Crew projects are a key avenue by which we introduce new people to our work, foster their commitment to protecting Montana's public lands, and inspire them to join our organization as members, advocates, and returning volunteers who are involved in our efforts to protect Montana's wild places. Each year, 40% of volunteers return to join us on another trail stewardship project later that season or the following year. Through these trail projects, we will not only inspire new folks to get involved in our organization as members and advocates but also will develop a network of passionate volunteers in the Helena area who will join us to improve their community's trails year after year. Together, this work helps us achieve our mission of connecting, uniting, and mobilizing people to keep Montana wild.

**Brief Budget Summary:** Specific expenses for these four trail projects include:

Recruiting volunteers - 30 hours: \$1,260

Project planning - 40 hours: \$1,680

Grocery shopping/ food prep for volunteer meals: \$189

In-field staff time- 168 hours: \$7,056

Travel costs - 1,220 miles X .61 per mile : \$744

Tool prep: \$126

Tools, gear, and personal protective equipment for volunteers: \$600  
Volunteer appreciation gift - 8 volunteers X \$10 per gift X 5 trips: \$ 400  
Post-trip follow-ups and de-rigging: \$504  
TOTAL \$ 12,559

We seek a \$4,000 grant from the Helena Area Community Foundation to make these trail projects to improve cherished trails in the Helena area possible. We have secured \$5,000 so far to support this work. We previously submitted an application for federal funding to support some project costs; however, due to the uncertainty of federal funding, we have made a backup plan to raise funds from individual donors during our spring fundraising campaign to fulfill the \$3,559 in remaining project costs.

**Expressed Public Benefit to the Residents of Helena:** According to the University of Montana's Institute for Tourism and Recreation, approximately 90% of Montanans recreate on public lands each year. For Lewis and Clark County, this means around 65,000 local recreationists will benefit from the increased trail safety and recreation opportunities this program will provide, boosting the health and well-being of families recreating on the county's bountiful public lands. Furthermore, trails are the backbone of Montana's 7 billion dollar outdoor recreation economy that supports 71,000 jobs annually. Residents of Lewis and Clark County will benefit economically from well-maintained and robust trail systems that fuel the local outdoor recreation economy. In addition, this project will allow 40 eager volunteers to get their hands dirty giving back to their backyard public lands while also learning about recreation ethics like "Leave No Trace," ways to reduce personal impacts at a time of growing outdoor recreation use that will benefit that Lewis and Clark residents for years to come.

Lastly, Wild Montana's office is based in downtown Helena, and we are proud to serve as a resource on outdoor recreation and conservation, benefiting the Helena community through providing area maps, friendly knowledge, and connecting residents with opportunities to get outside on area trails through our Wilderness Walks and other programs.



Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
PO Box 2508  
Cincinnati, OH 45201

Date:  
September 14, 2021  
Employer ID number:  
51-0198932  
Form 990 required:  
990, YES  
Person to contact:  
Name: Ms. Wiles  
ID number: 0196728

MONTANA WILDERNESS ASSOCIATION INC  
WILD MONTANA  
80 S WARREN ST  
HELENA, MT 59601

Dear Sir or Madam:

We're responding to your request dated March 23, 2021, about your tax-exempt status.

We issued you a determination letter in December 1978, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax-deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after the end of your annual accounting period.

- Form 990, Return of Organization Exempt From Income Tax
- Form 990-EZ, Short Form Return of Organization Exempt From Income Tax
- Form 990-N, Electronic Notice (e-Postcard) for Tax-Exempt Organizations Not Required to File Form 990 or Form 990EZ
- Form 990-PF, Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

According to IRC Section 6033(j), if you don't file a required annual information return or notice for 3 consecutive years, we'll revoke your tax-exempt status on the due date of the 3rd required return or notice.

You can get IRS forms or publications you need from our website at [www.irs.gov/forms-pubs](http://www.irs.gov/forms-pubs) or by calling 800-TAX-FORM (800-829-3676).

If you have questions, call 877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific time).

Thank you for your cooperation.

Sincerely,

*Stephen A. Martin*

Stephen A. Martin  
Director, Exempt Organizations Rulings and Agreements

Letter 4168 (Rev. 09-2020)  
Catalog Number 66666G

# YWCA

EIN Number: 81-0235416

Michelle Robinson/Development Director  
PO Box 518  
Helena, MT 59601  
Email: michelle@ywcahelena.org  
Telephone: 406-204-5437

**Total Grant Amount: \$1,900**

Total Amount Requested: \$4,000

Funding from City: \$1,400

Funding from County: \$0

Funding from HACF: \$500

**Organization's Mission:** The mission of the YWCA Helena is to prevent homelessness, provide safe and supportive housing for women and children experiencing homelessness, and provide services that restore hope, self-sufficiency, and happy and healthy lives.

NOTE: Denise King, interim director, attended training since I registered but was unable to attend. We visited after the workshop yesterday to prepare this request. You may recall I asked if there was an online option to participate.

**Description of Project or Program Receiving Funds:** Funding from the Helena Area Community Foundation helps us finish an exterior space for YWCA residents (women and children). The patio area off of Placer Street (south side of the home) is used for outdoor educational classes, therapeutic groups and summer gardening projects for staff and residents. It is also an alternate entrance/exit that is currently unusable and unsafe per code enforcement.

**Intended Use of Funds:** The YWCA Helena shelter has been undergoing a number of upgrades and renovations to ensure the 107 year old building remains a safe haven for our residents. We were provided a portion of funding to address the exterior patio on the side of the house, but were not able to complete the handrails, guard rails and gate since the cost of construction/installation exceeded the available grant funds we had secured. The majority of the work of resurfacing the exterior floor, replacing brick pavers (former trip hazard), and installing railing framework with the funding we received is complete, but the city code enforcement will not permit usage until the rail cabling and child-safety gate are addressed.

**Brief Budget Summary:** The original bid for the steel (painted) handrails, guard rails, cabling and steel plate bases with latching self-closing gates was estimated to be \$13,500-\$15,252 & and we budgeted a 5% construction contingency of \$675-\$776.25 respectively.

We utilized two other funding sources, who have contributed to get the patio and railing where it is today. We are required to add additional cabling on the railings across the patio, down the steps, and complete the installation of the child-safety, self-latching gate in order for the exterior space to pass inspection and open for use.

**Expressed Public Benefit to the Residents of Helena:** There is a chance a child could fall from the elevated patio by crawling under the lowest cable in the handrail. The spacial placement is not meeting code enforcement spacial allowance between cable rungs. Addressing the railing deficiencies & installing the gate will allow us to be in compliance with code enforcement, open access for residents and lessen the chance for injury/liability. Currently anyone passing by could access under our caution tape and potentially experience a fall, which we want to prevent from occurring.



**IRS** Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248319411  
June 01, 2009 LTR 4168C E0  
81-0235416 000000 00 000  
00018278  
BODC: TE

YOUNG WOMENS CHRISTIAN ASSN  
501 N PARK AVE  
HELENA MT 59601-2703

30047

Employer Identification Number: 81-0235416  
Person to Contact: Laura Botkin  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your request of May 20, 2009, regarding your tax-exempt status.

Our records indicate that a determination letter was issued in May 1948, that recognized you as exempt from Federal income tax, and discloses that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(2).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,

Michele M. Sullivan, Oper. Mgr.  
Accounts Management Operations I

***City of Helena, Montana***

**6/3/2025**

**To:** Joint Commission

**From:** City Manager Tim Burton, Fire Chief Jon Campbell, Open Lands Manager Brad Langsather

**Subject:** Update on Open Lands Management, Fuels, Wildland Fire Response

**Present Situation:** Fuel Reduction Projects continue, Quad County Fire Plan updated, Fire Dept. and mutual aid partners preparing for the season

**Background Information:** This is an information only session to provide updates and respond to questions

**Proposal/Objective:** City staff propose providing this session as part of the annual updating process

**Advantage:** For our elected officials to have first hand update from the departments involved in open land management and fire response

**Notable Energy Impact:** n/a

**Disadvantage:** n/a

**Notice of Public Hearing:** n/a

**Staff Recommendation/  
Recommended Motion:** n/a







# Open Lands Forest Information

- 1,800 Forested Acres
- Approximately 1,000,000 Trees
- 10 Year Forest Maintenance Interval
- 1,600 Acres Treated To Date



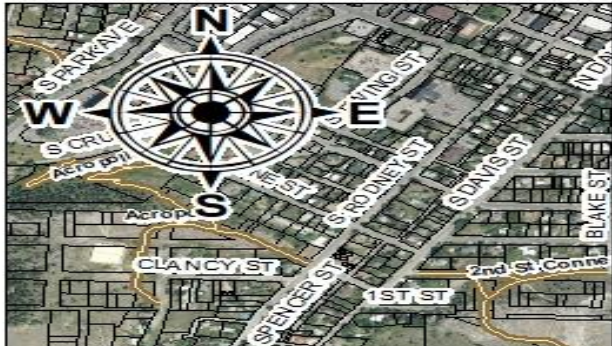
## An aerial photograph of a residential area with a white compass rose in the upper left corner. The compass rose indicates North (N), South (S), East (E), and West (W). Several streets are labeled in white text: STUART ST at the top, FLOWERREE ST in the upper middle, SUSSEX CT on the left, GRANITE AVE in the center, SILVERETTE ST on the right, and REBER R at the bottom right. A winding road on the far left is labeled 'Garden of the' and 'Steps'. The map shows a grid of streets and individual lots, some of which are shaded in different colors.

- 
- Grande Cannon Blvd
- Charlie Russell Dr
- Northwest Passage Trail
- Ambrose Trail
- Stanley Trail
- North Access Trail
- Prairie Trail
- 1906 Trail
- Powderhorn Trail
- Wolfcreek Trail
- Powerline Trail
- Rabbit Trail
- Porcupine (Straw) Trail
- 1 inch = 632 feet
- Page 14 of 198

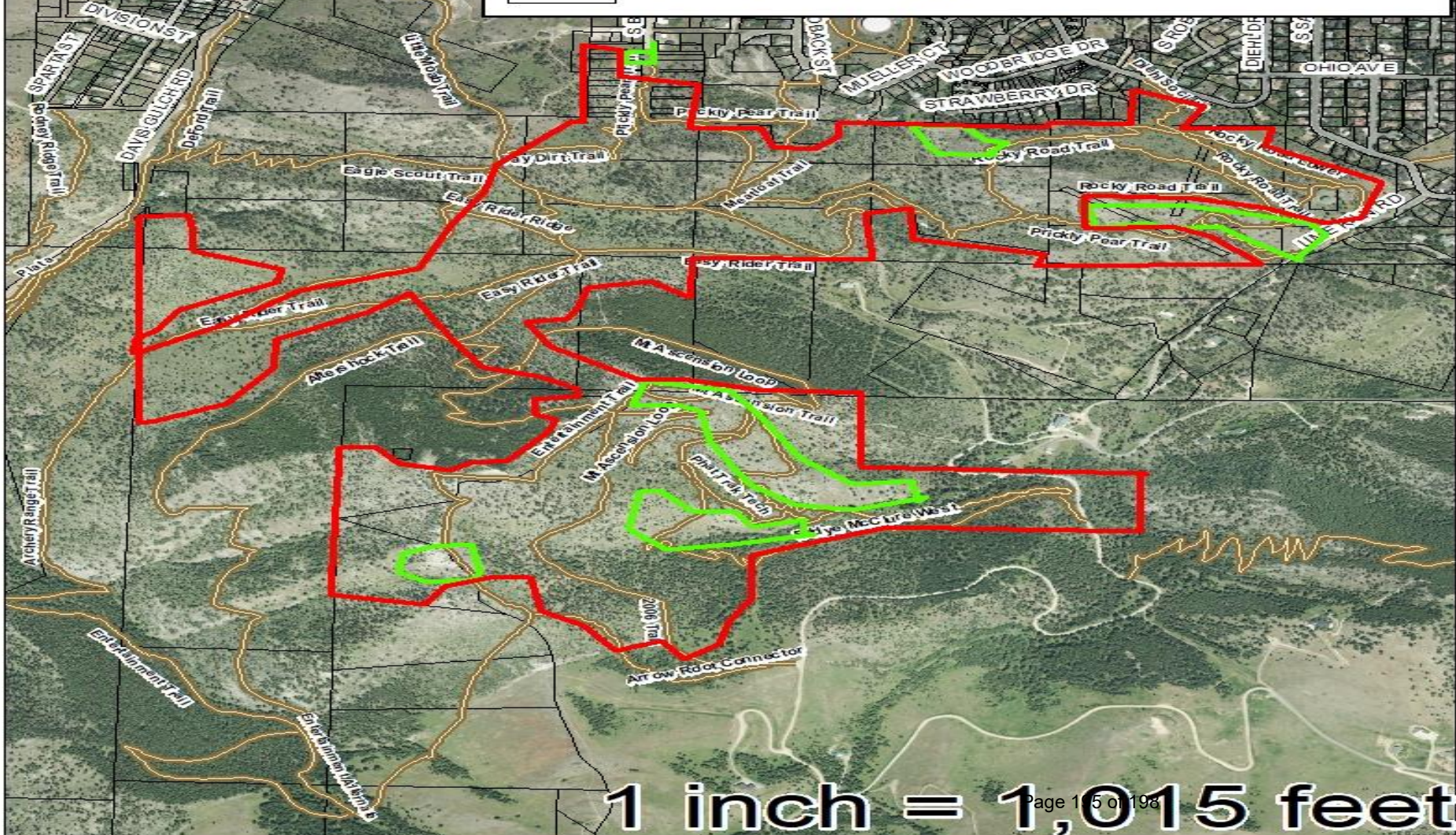
**1 inch = 632 feet**



# Montana Forest Action Plan Grant Backdrop Fuels Reduction Project

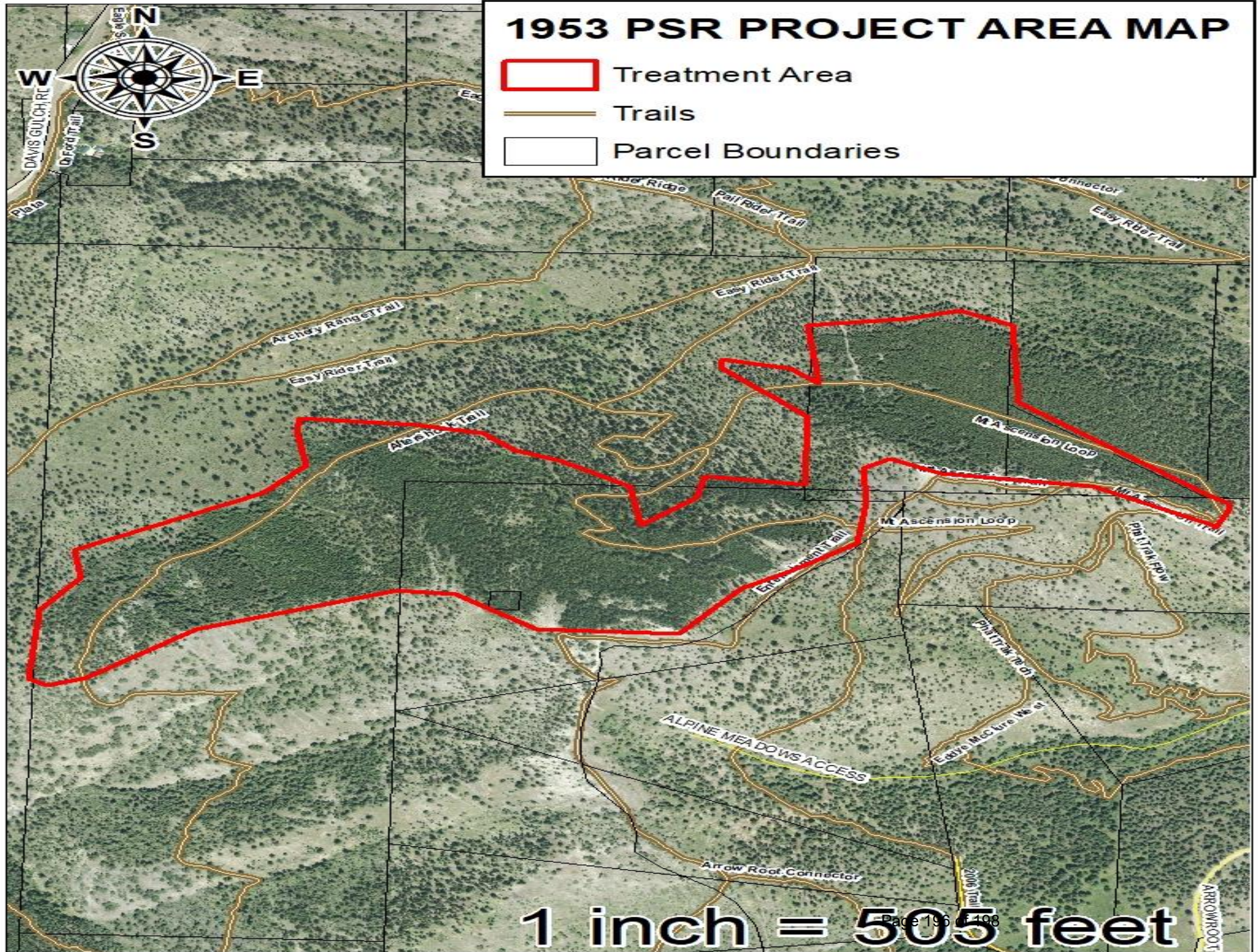


-  Treatment Unit
-  Natural Openings
-  Trails
-  Parcel Boundaries



1 inch = 1,015 feet





# 1953 PSR PROJECT AREA MAP

-  Treatment Area
-  Trails
-  Parcel Boundaries

1 inch = 505 feet



# 2025-2026 Open Lands Forest Management Plan

- Complete 500 Acres of Forest Fuel Reduction Treatment
- Projected Cost - \$750,000.00
- Grant Support = \$550,000.00

***City of Helena, Montana***

**May 28, 2025**

**To:** City and County Commissioners

**From:** *Ty Weingartner, MPO Manager*  
*David Knoepke, Transportation Systems*

**Subject:** Metropolitan Planning Organization (MPO) Update

**Present Situation:** The MPO is in the process of signing an agreement with the selected consultant for the development of three transportation plans; a Public Participation Plan, a Comprehensive Safety Action Plan, and a Long-Range Transportation Plan.

**Background Information:** The City of Helena, Lewis and Clark County, the City of East Helena and the Montana Department of Transportation has finished the designation of the MPO. Stakeholders have been attending Technical Advisory Committee and Policy Coordinating Committee meetings working through the budgetary and upcoming planning efforts.

**Proposal/Objective:** Update the City and County Commissioners on the MPO governing process, the status of the transportation plans and next steps. The presentation will include the MPO Manager.

**Advantage:** Update the City and County Commissioners

**Notable Energy Impact:** N/A

**Disadvantage:** None noted

**Notice of Public Hearing:** N/A

**Staff Recommendation/  
Recommended Motion:** Informational Only