



## Mission & Vision

**Connecting people and building community by catalyzing change and sharing resources to build a strong, vibrant, resilient, inclusive community.**

### 2024-2026 Strategic Plan

“The Foundation is dedicated to improving the lives of people throughout Carbon County by playing a key role in identifying and solving community issues through gracious dialogue, neutral convening, delivery of services, engaging, supporting, and collaborating with community partners, and by always working together. We accomplish this by providing resources through leadership, grant making and donor services. We bring together the financial resources of individuals, families, government, and businesses to support effective nonprofits and grass root efforts in our communities.” Tracy Timmons, Executive Director

## LEADERSHIP

### Connected Youth

**Purpose Statement: Create a community that offers concrete support and opportunity for families, youth, and children to reach their potential as contributing members of society.**

- **Early Childhood Coalition** – Convene service providers, youth organizations, and stakeholders to support early childhood care and education through collaboration, information sharing, and recruiting resources.
  - Know and connect people with services available to them.
  - Strengthen partnerships with a variety of service providers and youth organizations. Provide coalition members with learning/training opportunities and available resources.
  - Refresh, strengthen and promote the **Reading Adventure Backpacks** program at the library.
  - Participate in the statewide Early Childhood Co-op Education and Program opportunities.
  - Evaluation of early childhood topics such as the number of childcare slots available, needs and concerns of young families, and provider needs.
  - Work with groups to address needs for childcare in Carbon County.
- In the future we would love to provide:
  - Connecting kids/families to ECI screenings.
- **Safe Sitter** – Provide courses as needed for Safe Sitter education to prepare students in grades 6-8 to be safe when they are home alone, watching younger siblings, or babysitting. The instructor-led class is filled with fun games and role-playing exercises. Students learn safety skills, childcare skills, first aid & rescues skills, and life and business skills.
- **Safe at Home** – Provide courses as needed for Safe at Home education, a program designed for students in grades 4-6 to prepare them to be safe when they are home alone. The program is designed to enable any adult that enjoys teaching preteens to facilitate an introductory level program to prepare students to care for themselves when parents are away for short periods of time.

- **Future of Montana Volunteer Corps:** Providing volunteer opportunities to connect all youth to their community, through their individual talents and interests, to improve lives. Support each student in reaching their graduation requirement for community service.
- **Lunch in the Sun:** Coordination of the free summer lunch program for all youth, birth to 18 years old, by partnering with community organizations and community volunteers. Maybe a Church will take the lead?
- **Youth Steering Committee:** Facilitate and engage youth and key youth service providers annually, in the first quarter of each year, through facilitation methods. Generate an inventory of assets and issues facing local youth with dialogue designed to share and gather information about youth programs, resources, opportunities and to increase streamlined communication between service providers. Objectives of the committee will be established on a yearly basis on the outcome of the annual meeting.
- **Youth Workforce Development:** Connect youth with organizations and community leaders for career development opportunities through job shadowing and internships.
  - Increase the number of participants and organizations through sustainable partnerships.
  - Expand to a year-round program.
  - Increase the amount of cost shares between the Foundation and the organization.
  - Implement & analyze a required pre and post evaluation survey for participants and businesses.
  - Meet the demand for interested businesses and students.
- **Transition the Meadowlark childcare facility:** Work closely with DPHHS and community partners to build an additional childcare facility.
  - Evaluate the ability for the facility to operate independently as a childcare business.
- **Carbon County Resilience Youth Project:** In partnership with Carbon County Schools, Resilient Youth is a science-based program that (1) addresses the mental health needs of students, (2) equips students with stress management strategies, (3) cultivates the character traits of the five pillars of the High School, and (4) enhances students' sense of competency in self-awareness, self-management, social awareness, and decision making. Resilient Youth is a 6-week program taught twice a year to Sophomores and Seniors. Expand to other schools in the County.
  - In partnership with ESSA and Public Health, expand the curriculum to younger grades.
  - Bring the program to other school districts in Carbon County

## **Resilient Community**

**Purpose Statement: Building strong connections for a supportive community where all can thrive. Working together to strengthen the health of the community by listening and responding to needs focused on Community Mental Health, Transportation, Housing, Connection to Resources, and Age Friendly Initiatives.**

- **Carbon County Area Ride & Transit (CART):** Provide affordable and accessible transportation options county-wide by engaging community leaders in organization roles.
  - Implement CART strategic operational and fundraising plan, including increasing sponsorships.
  - Connect CART to the people who need rides.
  - Engage community partners support that can contribute to the long-term success of the plan.
  - Engage volunteer drivers to relieve pressure on existing staff.
  - Expand the demand response rides to increase opportunities for specialty rides with a third van.
  - Simplify paperwork to move to paperless.
  - Research and engage other funding resources, including revenue and mill levy generation options.
- **Workforce Housing:** Helping low-to-moderate individuals and families that live and work in Carbon County secure quality affordable housing in Red Lodge whether they want to own a home or find suitable long-term rentals.
  - **Workforce Housing Steering Committee** – Facilitate meetings with the Workforce Housing committee (comprised of community volunteers and stakeholders) to support housing goals throughout the county.
  - **Explore and develop local mutual self-help model.**

- **Actively participate in the Urban Renewal District.**
- **Owner-Built Housing** – Partner with Trust Montana to build quality and efficient single-family homes for qualified people working in the Red Lodge Area.
  - Increase number of local financial literacy and home purchase readiness opportunities for people in need of affordable housing.
- **Volunteer Recruitment**- recruit volunteers to assist on the Owner Built Housing project.
- **Workforce Housing Policy** – Partner with local government to research, educate, and assist in the creating/implementation of policies/tools/programs that increase affordable housing options in Carbon County.
- **Long Term Rentals Development** -Facilitate the committee to develop needed resources to make it easy and attractive for developers to develop long term rentals in Carbon County. This includes plans, programs, community connections, and local policy resources. Research programs that support landlords of long-term-rental and tenants.
- **Carbon County Connect Program Provider Appreciation/Lunch & Learn Events**
  - Overarching Community Health Statement for the City/County Created. Utilize a comprehensive statement that unifies the community on how we define health in Carbon County.
  - Work with the City/County Community representatives to create the statement.
- **Disaster preparedness:** Manage emergent volunteers, financial and in-kind donations in the event of a community disaster and be ready to respond to the next one.
  - Support the community disaster preparedness plan(s).
  - Trained staff member(s) to facilitate emerging volunteers.
  - Cash and In-kind donations managed.
  - Outreach assistance.
  - Complete and train for the emergency procedures workbook.
- **Age-Friendly Steering Committee** – Carbon County volunteers who are dedicated to creating a community that is inclusive to all ages and abilities through communication, transportation, housing, and other emergent needs.
  - **Age-Friendly Carbon County Newsletter** - a quarterly newsletter written by the Age-Friendly Steering Committee that supports folks of all ages in Carbon County. The newsletter will prioritize and focus on issues, events, and voices from/in Carbon County. May transition in 2024 to inclusion in the Foundation newsletter.
  - **Caring Cards** - an intergenerational, grassroots letter writing program. In partnership with the 5<sup>th</sup> graders at Mountain View elementary, Caring Cards aims to reduce isolation in community seniors by sending them a friendly card in the mail monthly. 5<sup>th</sup> graders can hone their letter writing skills and broaden their understanding of our community.
- **Resilient Resources** – Connect the community with resources and opportunities to ensure they can continue to live and thrive in Carbon County.
  - **Carbon County Connect:** Create, manage, and maintain a digital and print directory of Carbon County Resources. The digital directory is updated quarterly. The print directory will be updated and republished every two years.
  - **Navigators:** Actively recruit and train Volunteers to guide people in need of services through resource applications, programs, and managed grant fund applications.
  - **Salvation Army** - in partnership with Salvation Army, fundraising for the community grant-making fund. 90% of funds stay in Carbon County. This fund offers flexible support to those experiencing financial need of up to \$550.
  - **Firewood Assistance Program** - Providing ½ cord of free firewood to individuals and families who are physically or financially unable to procure firewood for themselves. Using donated wood, volunteers process the firewood monthly. Will need to locate additional equipment to continue the program.
  - **Growth Policy Engagement** – Annually review & participate in the process of the City & County Growth policies to ensure nonprofit consideration and inform nonprofits.

- **Community Mental Health:** Educate and increase awareness of Mental Health resources while decreasing the associated stigma. Create a long-term approach to bring mental health programming into the entire school district. Create long-term program options for people in the area.
  - **QPR Training-** In partnership with Public Health, organize and facilitate QPR training across the community. Like CPR, Question Persuade Refer (QPR) trains on how to recognize the warning signs, clues, and suicidal communications of people in trouble, and gain skills to act vigorously to prevent a possible tragedy.
  - **Resilient Rams** - In partnership with Red Lodge High School, Resilient Rams is a science-based program that (1) addresses the mental health needs of students, (2) equips students with stress management strategies, (3) cultivates the character traits of the five pillars of Red Lodge High School, and (4) enhances students' sense of competency in self-awareness, self-management, social awareness, and decision making. Resilient Rams is a 6-week program taught twice a year to Sophomores and Seniors. Expand to other schools in the County.
    - In partnership with ESSA and Public Health, expand the curriculum to younger grades.
    - Bring the program to other school districts in Carbon County

## **Robust Arts & Culture**

**Purpose Statement: Catalyze the development of the Red Lodge Area as a destination for arts, culture, and conferences through continued development of the Roosevelt Center.**

- **Destination for Arts & Culture**
- **Art Engagement**
  - Support local artists in Carbon County by providing space for them to work.
    - Prioritize tenants who engage in art for available studio spaces.
    - Actively participate in and support the Art Walk.
  - Feature tenant artwork and local artists in the community with rotating local exhibits on 1<sup>st</sup> and 2<sup>nd</sup> floors, auditorium, conference room, lower level, and entryway displays.
  - Space in the building to offer art workshops and classes for the community.
  - Display and feature art in the outdoor sculpture garden.
  - Continue to grow and build the capacity of other local arts organizations.
  - Partner with outside organizations such as Montana Art Gallery Directors Association (MAGDA) and the Yellowstone Art Museum.
- **Performing Arts & Culture**
  - Theater
    - Active role coordinating annual Shakespeare in the Parks event(s).
    - Support, house, and sustain Red Lodge Theater Company including development of next generation of Board/Leadership. Also encourage growth if other theater groups are interested in doing diverse types of performing arts programming.
    - Partner with the Red Lodge High School to offer performance space and practice space for plays and workshops.
    - Work with alternative live theater performers to bring a wide range of programming to Carbon County.
  - Music
    - Provide a venue with multiple spaces to encourage performances from Chamber musicians, Jazz, acoustic, full bands.
    - Support musicians with studio spaces.
    - Partner with Red Lodge Music Festival to host kids practices and performances.
    - Bring in a variety of musicians to perform for the community (in a space outside of a bar).
    - Encourage local music teachers to teach and perform in the building.
    - Partner with Music from the Beartooth's to host travelling musicians and performers.
    - Work with donors to increase the number of concerts and performances at the Roosevelt Center.

- Host sound engineers and music professors from Powell, Rocky Mountain College, MSU-Billings and Bozeman.
  - Community use of stage and music equipment to encourage additional events in the community especially in the shoulder season.
- Dance
  - Host community dances, additional opportunities for the community to come together and celebrate with dance.
  - Be a venue for the local dance practice and recitals including Pat’s School of Dance.
  - Provide a venue to host the High School prom’s, winter formals, homeschooler dances, etc.
- Culture
  - Partner with Humanities Montana to bring in a variety of lectures, seminars, and events.
  - Provide a space for rotating travelling exhibitions, like the Western Heritage Museum.
  - Actively engage with community members who would like to create opportunities for open discussions and dialogue (example: Randy Dragon’s Russia seminar).
  - Host Winter Farmer’s Markets for the community to support local vendors and opportunities for community to come together during the winter months.
  - Partner with Montana Renaissance Festival to bring performers and additional business downtown in June.
- Focus on Youth Performing Arts Programming:
  - Many of the schools in Carbon County do not have Performing Arts programming in the schools, provide opportunities for elementary, middle, and high schoolers to experience live theater performances and encourage non-sports-based activities. Focus areas include theater classes and workshops, sponsoring Missoula Children’s Theater in Red Lodge, partnering with MT Shakes! Open Mic Nights for teens, poetry slams, and places to perform live music outside of bars that are 18-21+. 2024 focus on expanding by partnering with the Arts Guild to offer art classes and workshops. When the third floor opens, create a community gathering space for teens who are looking for after school activities.
- **Youth Art Education Programming**
  - The Roosevelt Center will begin arts classes for youth with the goal of once a month as funding allows. Future partnerships with the Arts Guild starting in 2024 as well as the Boys and Girls Club and any other organizations, as well as any local artists instructors who are interested in teaching. If the classes are offered free to the public, the artist can be paid, and supplies covered by RLACF.
- **Destination for Conferences**
  - Actively seek out conferences to bring to Carbon County to help stimulate the local economy by increasing the number of people in the area.
  - Provide a venue that can host large 300+ person events.
  - Utilize the newly launched Meet Me in Red Lodge conference website to help draw in new visitors and promote other community businesses.
  - Provide AV/audio equipment and remote capabilities and expertise for a “larger city” experience.
- **Roosevelt Center Capital Plan: fully Restore, Reuse, and Revitalize the Roosevelt Center**
  - Use the Roosevelt Business Plan to prioritize capital repairs and funding opportunities for redevelopment of both sides of the building. Continuously update the business plan so that it is a current, streamlined and implemented working document.
  - Open the historic 3<sup>rd</sup> floor of the 1920’s building.
  - Install a five-stop elevator installed with a secondary exit.
  - Permanent endowment is established and increased annually.
  - Complete necessary capital projects to increase physical occupancy within the building.
  - Outdoor spaces developed & gatherings taking place in them. Increase the number of sculptures and outdoor events.
- **Roosevelt Operations:** Provide an arts, culture, performance, reception, conference, education, and community gathering space, providing both indoor and outdoor venues, for people to interact, converse, celebrate and

express themselves. We need these venues because our community currently lacks adequately sized downtown community spaces for people to meet and engage with one another.

- Increase the number of events and attendance annually at the Roosevelt Center.
- Collaboration, Networking, and partnerships with other organizations to bring events to the community. Increase returning events by sending thank you notes and appreciation.
- Increase the number of short-term rentals and long-term tenants annually to lower the operating costs of the building.
- Make sure that tenants are current and are paying rent, and that event rentals are being properly tracked, invoiced, and paid.
- Increase the number of repeat/re-occurring events.
- Well-developed volunteer cadre to support the Center to keep it accessible. Grow the volunteer list by 50 people by next year.
- Volunteer committee structures streamlined.
- Youth Garden and/or Community Garden. Provide a place for kids and community members to grow vegetables, flowers, fruit, and a chance to connect with the community.

## **Thriving Nonprofits**

**Purpose Statement: We assist in the development of a thriving nonprofit sector by connecting organizations of all capacities to education, technology, professional services, financial assistance, and volunteers.**

- **Fun Run for Charities:** Facilitate the largest collaborative fundraising event in Carbon County while maintaining the spirit of working together to raise funds for and awareness of county wide charitable efforts.
  - Increase Match and Sponsor donations grow so the Match percentage to the charities grows.
  - Increase participation each year.
  - Annual Steering committee meets, post event.
  - Charity volunteer hours are met.
  - Effectively manage event expenses and staff hours to keep them low.
- **Back Office Services:** Provide essential services not easily accessible to charities through other options.
  - Grant writing, fundraising, accounting, payroll, web development and storytelling.
- **Shared Services Center:** Provide neat, clean and technologically connected meeting spaces for community focused groups.
  - Nonprofit equipment purchased and shared to streamline asset sharing and conserve financial resources for all groups.

## **GRANT MAKING**

- **Purpose Statement: sharing resources to build a strong, vibrant, resilient, inclusive community.**
  - There are two types of grantmaking through the Red Lodge Area Community Foundation:
    - **Individual grants** direct to individuals or directed to organizations to help the individual thrive.
    - **Community grants** direct support to local area nonprofits to help with operations and program costs. We assist in the development of a thriving nonprofit sector by connecting organizations of all capacities to education, technology, professional services, financial assistance, and volunteers.
- **Individual Benefit Grants**
  - **Early Childhood Grant Fund:** Providing funds for educational, developmental, and supportive services for children ages 0-8 including, but not limited to, childcare, preschool, caregiver education and other developmental enhancement opportunities.
  - **Youth Enrichment Grant Fund:** Providing funds for youth who otherwise could not participate in activities by providing funding for classes, workshops, participation fees, registrations, conferences, transportation, or other products or services that support participation.

- **Senior Ark:** Grant fund for seniors 65+ facing emergent, non-medical barriers to aging in their place of choice.
- **Carbon County Relief Fund:** Supporting the community when disaster strikes. Able to respond quickly in response to natural disasters including but not limited to fires, floods, mudslides, rockslides, blizzards, frigid temperature, massive snowfalls, drought, earthquakes and pandemics.
- **Educating Emerging Artists Fund:** Providing funding to artists who are in poverty and low-income situations and are presented with educational opportunities that will positively impact their ability to create art as an income.
- **Green Fund:** Steward High School Green TEAM to leverage grantmaking funds for biggest community impact.
- **Community Grant Making:** Providing grants to Carbon County nonprofits ranging in the amount of \$100 to \$1500. These grants must meet a specific need or serve a purpose in one or more of the following categories: arts and culture, education, the environment, health, and social services.
  - **Innovative-** Request is for a new program or capacity building program that is collaborative in nature.
  - **Nonprofit Sustainability-** Request is to assist a nonprofit organization with resources that will help ensure longer term sustainability for the organization.
- **Fiscal Sponsorships:** Fiscal sponsorship provides the Foundation’s tax-exempt status to Carbon County grass roots efforts that align with our mission and bylaws. Fiscal sponsorship conserves precious charitable funds by supplying a streamlined set of accounting and back-office services to these organizations. Fiscal sponsorships assure that the community can quickly pivot and respond to community opportunities and sudden developments, in the short term and longer term.
  - Fiscal Sponsorships are accessed by a variety of community efforts.
  - Support and capacity building for grass roots efforts to ensure community resiliency.

## **PHILANTHROPY**

### **Fundraising**

**Purpose Statement: The Foundation relies upon the generosity of donors for most of our funding. Consequently, fundraising is an activity of major importance. Fundraising is an essential way for the Foundation to bring in revenue to accomplish our mission. Fundraising is much more than just asking for money. It consists of ways for the Foundation to build relationships, bring in support for our programs and projects, attract and engage donors who want to donate time, treasures or talents and ensure donors are thanked and kept informed about how their support has created an impact.**

- **Donor Services**
  - Diversified income resources are balanced and not more than 30% of our revenue comes from a single source.
  - Volunteer Advocate feedback from connections with volunteers is used to improve engagement.
  - We track the total number of volunteer hours for all Foundation programs and projects.
  - Planned giving conversations/marketing occur.
  - Donor Retention rate remains above the 45% national average.
  - Appreciation engagement.
  - Quarterly Membership meetings: what we are doing and what we are up against. Generate Quarterly Milestones communications for members.
  - Intentional focus on the growth of monthly donors through marketing and direct communication.
  - Honor donor intent.
  - Board member fundraising home events reintroduced (post COVID, post flood)

- **Written Fundraising Plan:** Achieve the annual and long-term fundraising goals of the Foundation, as illustrated in the written fundraising plan that is tied to the approved budget, including land donations and endowments. Communicate fundraising goals, how much raised, and amount still needed.
- **Written Newsletter Program & Project Case for Support:** Storytelling-compelling stories, photos, videos, stats, clear call to action, for every project and shared fully in our comprehensive distribution channels.
- **Written Stewardship Plan:** Gratitude plan to ensure all donors are thanked and recognized for their support beyond the initial receipt and thank you letter.
- **Board Emeritus Society** explored to retain previous board member experience with the Foundation.
- **Grant Getting Cohort** expanded with additional staff for long-term sustainability.

## Administration

**Purpose Statement: Ensure the security and long-term stability of the Foundation by providing support to the board, stakeholders, and staff through sound management and leadership. Manage, lead, and support the staff strategically to fulfill the objectives of our mission. Lead the board towards generative and strategic governance, and responsible fiduciary oversight.**

- **Human Resources:** all positions filled with qualified and trained staff to fully implement the annual strategic plan. Culture of Foundation is observed as thriving according to the Mission, Vision, Values.
- **Board of Directors:** The skilled diverse board is responsible for governance and oversight, evaluating the Foundation’s work from a macro-perspective and ensures that the work advances the mission in an ethical and legal manner.
- **Annual Meeting:** Annual report and membership meeting occurs in an inclusive, engaging, informative and appreciative way.
- **Finance:** Establish a balanced budget providing adequate resources to successfully implement the strategic plan, building, and maintaining a 3-month operation reserve, fully funded building capital fund, and grow our operating endowment annually.
- **Statistics and Metrics:** Create a qualitative and quantitative data tracking system for internal and external uses.
- **Information Technology:** Ensure adequate technology is provided for staff, volunteers and patrons of our buildings.
- **Security & Confidentiality:** Continuous implementation of all measures to secure all confidential information. Ongoing training in cyber security.
- **Strategic Planning:** Current three-year guiding document that is fully implemented annually.
- **Compliance** further developed to match long term maturity of the nonprofit life cycle.
- **Organization Financial Review** in 2024, and a full audit in 2025.

### **Sustainability Statement of transferring programs or projects.**

Our mission statement summarizes the purpose of the Red Lodge Area Community Foundation (Foundation) as “Connecting People, Building Community.” Translating those words into action – building an intentional and inclusive community that engages people of all ages and all walks of life – is the mission of the Foundation. Fostering such a community begins with innovative ideas. The Foundation provides a forum for community members to come together to discuss important issues and share ideas for addressing them. But too many innovative ideas die on the vine if they are not supported by active leadership, engaged volunteers, and sustaining resources. Like a newborn bird, newly hatched ideas for action often need a period of incubation before they can take flight on their own. The Foundation provides that period of capacity building, not only through financial support, but also by providing strategic advice on creating a sustainable organization and offering feedback that evaluates its effectiveness. **In short, we at the Foundation encourage innovative new ideas and foster their development into sustainable actions, which can then be launched into permanent homes within our community. We strive to build a community that we are all proud to call home.**





### **Baby Birded Project History**

- ✧ **Youth Mentoring program** for middle and high school students turned to Domestic & Sexual Violence Services.
- ✧ **Red Lodge Area Economic Development Corp** transferred to a new board.
- ✧ **Red Lodge Area Food Partnership Council** obtained their goals and dissolved.
- ✧ **It's in the Bag** incorporated into the middle school.
- ✧ **Community Garden** incorporated into the Roosevelt Center.
- ✧ **REWIND (Recycle Electronic Waste into New Devices)** incorporated into the City Recycling Center.
- ✧ **Beartooth Recycling** became their own nonprofit.
- ✧ **Red Lodge Cross Country Ski Foundation** merged with Silver Run Foundation.
- ✧ **Jane Ferguson Nature Camp** resumed operating as their own nonprofit.
- ✧ **Imagination Library** transferred to the Friends of the Red Lodge Carnegie Library.
- ✧ **Senior Farmers Market Nutrition** program transferred to the Red Lodge Farmers Market.
- ✧ **Red Lodge Tool Library** moved to the Red Lodge Community Church. 2022
- ✧ **States of Mind** mental health speaker series transitioned to Public Health. 2023.
- ✧ **Books for Kids** transferred to the Friends of the Red Lodge Carnegie Library. 2023