



2026 Otto Bremer Trust Community Responsive Fund

As a trusted partner to the Otto Bremer Trust, this year the Montana Community Foundation will grant \$2 million to Montana organizations through the **Otto Bremer Trust Community Responsive Fund**.

The following outlines the Trustees' designated focus areas for the 2026 cycle.

Community Responsive Fund Priorities:

- **Food.** Grants to organizations and programs that directly operate meal sites and food pantries to meet basic daily needs. (Large, regional, and statewide food banks are not included.)
- **Shelter.** Grants to organizations and programs that provide short-term and emergency shelter beds for people who are housing-insecure or facing homelessness.
- **Low-income health care clinics.** Grants to organizations and programs that primarily provide affordable medical, dental, and mental health services to people with limited financial resources or who are uninsured/underinsured.
- **Disability services.** Grants to organizations and programs that support people with physical and/or cognitive disabilities.
- **School-based mental health.** Grants to organizations and programs that have established school-based mental health services.

Eligibility Criteria:

Required of all applicant organizations:

- The work must align with the OBT Community Responsive Fund focus areas for 2026 (see below).
- Beneficiaries of the grants must reside in Montana.
- The organization must have a 501(c)(3) determination from the IRS. (Government entities, including public schools, are not eligible. Non-public schools are eligible.)
- The organization may not have an open OBT strategic grant.

The majority of awards will be made to organizations that meet all the eligibility criteria listed below. Some funds, however, will be made available for organizations that do not meet one or more:

- The organization must have at least five years of successful operations during which they have continuously held 501(c)(3) status.
- The organization must complete annual audited financial statements prepared by an independent CPA.
- The organization’s actual operating expenses must have been \$2 million or more in the last fiscal year, excluding in-kind expenses.
- The amount awarded may not exceed 10 percent of the organization’s previous fiscal year’s public philanthropic financial support.

Funding criteria:

- Grants may be up to \$75,000 to support operations, programming, and/or capital projects.
- The amount awarded may not exceed 10 percent of the organization’s public philanthropic financial support in the previous fiscal year.
- No more than 10 percent of grant funds may be used for administrative expenses — the bulk of grant funds must be used for direct services.

Ineligible projects:

- Work to influence public policy.
- Sponsorships or annual events.
- Fiscal sponsorships.

Ranking Criteria:

Montana Community Foundation is committed to maximizing community impact. We strive to ensure resources create meaningful, measurable outcomes in the communities served. This work includes targeting and prioritizing underserved communities and issues, and focusing on projects that address systemic issues, ensuring long-term benefits and sustainable solutions.

To meet these goals, a committee will evaluate applicants based on the following criteria:

- **Underserved Communities.** Priority will be given to organizations serving rural or tribal communities and populations, as well as low-capacity communities. While organizations do not need to be based in these areas, they must demonstrate a meaningful relationship with, and commitment to, supporting underserved populations.
- **Alignment with Funding Priorities.** Applications must clearly illustrate how the program/organization directly aligns with the funding priority.
- **Impact and Reach.** Applicants should demonstrate the potential impact of the program/organization’s work on the target population or community. The review committee will consider factors such as the number of people served, the depth of the impact, and the potential for long-term sustainability.

- **Evidence of Need.** Applicants should clearly demonstrate the need for the proposed program within the community. This could include data on relevant demographics, community input, or evidence of existing gaps in services.
- **Feasibility and Sustainability.** Applicants should outline the feasibility of implementing the program and its prospects for long-term sustainability. For organizations seeking operational support, applicants should demonstrate long-term strategies for ensuring the sustainability of the organization. Applications showing realistic plans for funding, staffing, and continuous support are likely to receive higher scores.
- **Community Engagement and Collaboration.** Programs/organizations should engage the community they serve and collaborate with other stakeholders. Projects that involve community members in the planning and decision-making process may be more effective and sustainable.
- **Measurable Outcomes and Evaluation.** Applicants should clearly and specifically outline the goals and objectives of their proposals, as well as the feasibility of measuring their outcomes. Projects with well-defined metrics for success and plans for evaluation will be scored higher.

Application Process:

- Applications will be open **April 15, 2026 – May 18, 2026 (11:59 PM MDT)**.
- Applications must be submitted online through Montana Community Foundation’s [Grant Portal](#).
- Application instructions can be found in [MCF’s Funding Guide](#).
- All applications will be reviewed by external Grantmaking Advisory Committees composed of experts in the field.
- Applicants will be notified of funding decisions in the Fall 2026.

A webinar to review this year’s competition will occur on April 8, 2026, from 10 – 11 AM. [This](#) is the link to attend that event, and its recording will also be posted on the program’s [webpage](#).

Reporting:

- A project report will be due within one year of receiving funds. Recipients will receive guidance and reminders to submit that report.

For questions about the fund or application please contact Peter Baker, Program Director, Impact Programs, at peter@mtcf.org or 406-281-6324.

Additional Points of Guidance/FAQs for 2026 Cycle:

- **Several local organizations do similar work but did not have expenses of more than \$2 million last fiscal year. Can these organizations apply as a coalition and consolidate their finances — including their previous fiscal year’s actual expenses — into one entity?**

No. Multiple providers within a network are eligible to apply individually, and their application must be to address local direct care and not facilitation or support for the larger network.

- **An organization is the backbone of a local coalition that has a shared financial relationship. Could that coalition apply for a grant through the OBT Community Responsive Fund?**

No. If the organization is both the coordinator and service provider, however, it is eligible. Support for costs used by the applicant organization and which might be used by / shared with other providers is usually ineligible. Shared use would generally need to be of nominal value and incidental.

- **If an organization works in multiple locations across our funding geography, is it eligible to receive multiple grants through the OBT Community Responsive Fund?**

Yes. The Trustees are open to individual grants that are restricted to different locations. However, pooling multiple regions together to receive a larger grant is not allowed. The maximum grant is \$75,000.

- **Is a national organization allowed to apply on behalf of an affiliated organization or program in our region?**

The preference is to directly support local affiliates to retain the most financial resources possible for direct service work. Therefore, the assessment of local organizations with national affiliations should be based on the size of the local organization itself. Local organizations that do not meet the established OBT Community Responsive Fund criteria may be presented as a non-conforming grant.

- **How is “public philanthropic financial support” defined?**

Public philanthropic financial support includes dollars raised through private fundraising (individuals, businesses, foundations, etc.), giving campaigns, fundraising events, United Way awards, and similar methods. It excludes things like government grants and contracts, earned income and investment gains. In-kind contributions (e.g., donated or rescued food, volunteer hours) are also excluded.

- **Guidance states that “No more than 10 percent of grant funds may be used for administrative expenses.” What counts as administrative expenses? Are these additional expenses beyond traditional indirect expenses?**

Administrative expenses include management and general expenses and fundraising expenses, which are consistent with Form 990 (Part IX, Statement of Functional Expenses). Administrative expenses through the OBT Community Responsive Fund are not additional expenses beyond traditional indirect expenses.

- **Can you clarify the use of grant funds in relation to the guidance that no more than 10 percent may be used for administrative expenses?**

Ninety percent of grant funds are restricted to programs and direct services that align with the focus areas. Note that the grant funds may be utilized by multiple programs as long as the activities align with the focus areas. Ten percent of grant funds are unrestricted and may be used to support administrative expenses (e.g., indirect costs) or may be used for programs and direct services that align with the focus areas.

- **Do funded programs need to spend OBT Community Responsive Funds within 12 months?**

Yes. Funded programs must spend the funds within 12 months. The start date occurs when the grant is made from Montana Community Foundation to the grantee.

- **Can organizations request more than 10% of their previous fiscal year's public philanthropic support?**

Yes, organizations can request funding for more than 10% of their previous fiscal year's public philanthropic support. If they do so, they will be grouped with other applications that have one or more characteristic(s) that do not adhere in full with certain (applicant) eligibility requirements, such as this 10% item. Additionally, applications that do not adhere to one or more eligibility requirements will be considered for a limited number of awards and will receive a reduced share of total funding.

- **Are Higher Education Institutions or their foundations eligible applicant organizations?**

No.

- **Would one-time rental assistance for families facing homelessness be eligible for consideration under the Focus Area of Shelter?**

Yes.

Welcome

**2026 Otto Bremer Trust, Community
Responsive Fund Competition –
Informational Webinar**

April 8, 2026



MONTANA
COMMUNITY
FOUNDATION

HELPING YOU SHAPE MONTANA'S FUTURE THROUGH GIVING



Reminders & Introductions

- Webinar scheduled for 1 hour
- Time will be held at the end for your questions
- Link to a recording of this webinar will be added to the program's webpage on the MCF site
- Additional information will continue to be added to the PDF linked on the webpage moving
- Please reach out for individual consultations
- Please ensure your mics are muted

Introductions:

- Peter Baker – Impact Programs Director
- Sarah Varley – Impact Programs Coordinator



Agenda

- I. Montana Community Foundation & Otto Bremer Trust
- II. 2026 Competition Priority Areas (x5)
- III. Eligibility Requirements
- IV. Application
- V. Timeline
- VI. Contacts
- VII. Q&A





I. Montana Community Foundation & Otto Bremer Trust

MCF: Established in 1988, Montana Community Foundation's mission is to cultivate a culture of giving so Montana Communities can flourish.

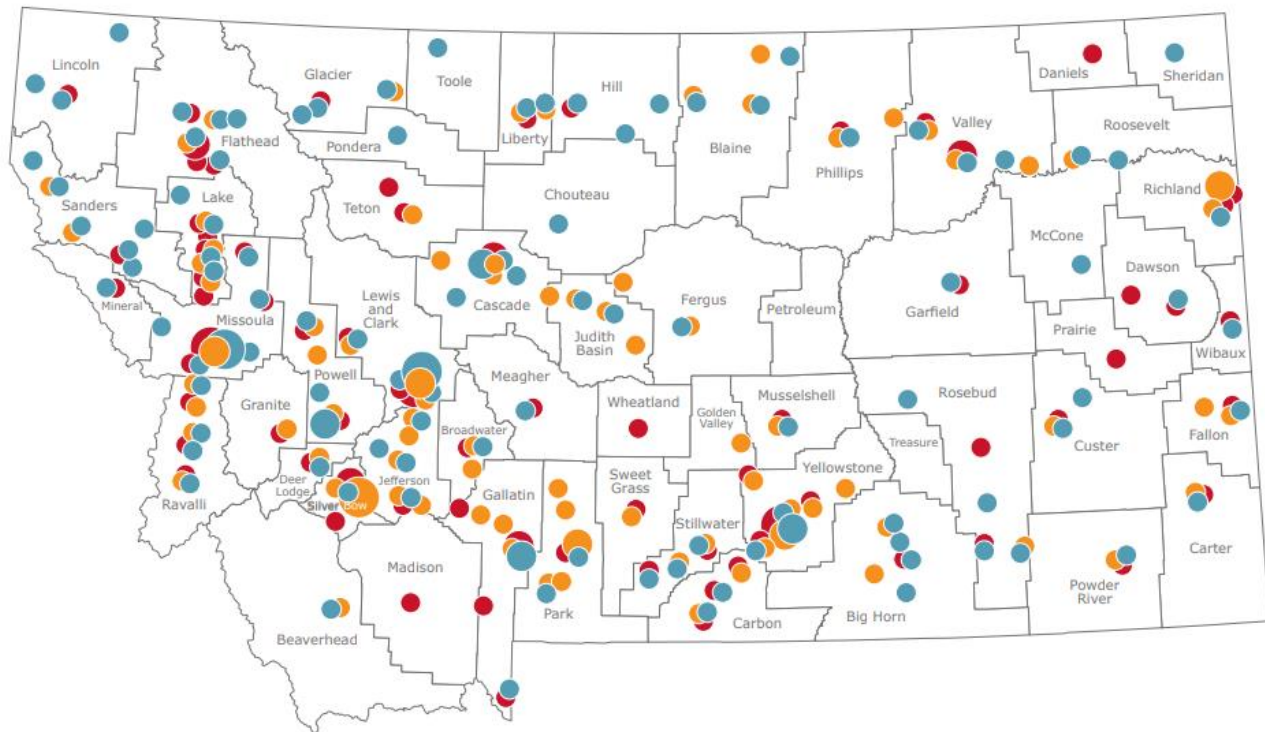
OBT: Established in 1944 by Otto Bremer, the trust is committed to ensuring its assets are put to work to support a better quality of life for people in the region it serves (Minnesota, Montana, North Dakota and Wisconsin).



MCF has partnered with OBT since 2024 to support communities across Montana through responsive, impact-driven grantmaking. MCF administers the Community Responsive Fund program in alignment with the priorities, eligibility requirements, and criteria established by the (Otto Bremer) Trust's Trustees.



GRANTS, SCHOLARSHIPS, AND ANNUAL ENDOWMENT DISTRIBUTIONS



- Grants** ● The blue dots show where grants were awarded in Montana.
- Scholarships** ● The orange dots show the hometowns of scholarship recipients.
- Annual Endowment Distributions** ● The red dots denote where annual endowment distributions were made.

\$1.3M	227	\$6.1M	\$5.6M
Scholarships Awarded	Students Served	Total Grants	Total Annual Endowment Distributions



II. 2026 Competition Priority Areas (x5)

Priority Areas:

1. Food. Organizations and programs that directly operate meal sites and food pantries to meet basic daily needs.
2. Shelter. Organizations and programs that provide short-term and emergency shelter beds for people who are housing insecure or facing homelessness.
3. Low-income health care clinics. Organizations and programs that primarily provide affordable medical, dental, and mental health services to people with limited financial resources or who are uninsured/underinsured.
4. Disability services. Organizations and programs that support people with physical/cognitive disabilities.
5. School-based mental health. Organizations and programs that have established school-based mental health services.



Priority Areas cont.

***For all priority areas, the emphasis is to provide support to programs and direct services that align with a respective focus area.**

Food: Large, region- and state-wide food bank activities are not eligible. Large-scale food storage and distribution center activities that primarily function to supply food to other local organizations are not eligible. Church-provided services are eligible.*

Healthcare: Government-owned hospitals or joint-powers healthcare systems are not eligible. Affiliated 501(c)(3) hospital and healthcare foundations may be eligible.

Shelter: Short-term and emergency shelter beds are eligible, as well as hotel stays when shelters are full, or providing hotel stays in rural areas where a stand-alone emergency shelter does not exist. Church-provided services are eligible.*

Disability Services: Support to achieve holistic inclusion and participation in all facets of life (work, recreation, etc.).

Mental Health: These can be organizations that work with public school to provide mental health services.



III. Eligibility Requirements

Eligibility Requirements:

1. The work must align with a OBT Community Responsive Fund focus areas for 2026.
2. Beneficiaries of the grants must reside in Montana.
3. The organization must have a 501(c)(3) determination from the IRS. (Government entities, including public schools, are not eligible. Non-public schools are eligible.).
4. The organization must have at least five years of successful operations during which they have continuously held 501(c)(3) status.
5. The organization must complete annual audited financial statements prepared by an independent CPA.
6. The organization's last fiscal year's actual expenses must have been \$2 million or more. (Excluding in-kind expenses.).
7. The organization may not have an open OBT strategic grant.



Eligibility Requirements cont.:

8. Grants may be up to \$75,000 to support operations, programming and/or capital projects. Grant funds can not be used for the following:
 - Work to influence public policy
 - Sponsorships or annual events
 - Fiscal sponsorships
9. The amount awarded may not exceed 10 percent of the organization's previous fiscal year's public philanthropic financial support.
10. No more than 10 percent of grant funds may be used for administrative expenses – the bulk of grant funds must be used for direct services.





Eligibility Requirements cont.:

A limited number of awards can be made to organizations that do not meet one or more of the following criteria:

1. The organization's last fiscal year's expenses must have been \$2 million or more.
2. The organization must have at least five years of successful operations.
3. The organization must complete annual audited financial statements prepared by an independent CPA.
4. The amount awarded may not exceed 10 percent of the organization's previous fiscal year's public philanthropic financial support.
 - Public philanthropic support is determined by Form 990 (Part VIII, Lines 1a, 1c, and 1f. Do not include noncash contributions from line 1g.). *This form will be completed as part of your application.



Eligibility Requirements cont.:

Applicant Organizations (Coalitions/Networks)

- The organization that provides the backbone coalition coordination is not eligible to receive funding. If the organization is both the coordinator and service provider, however, it is eligible.
- Individual providers within a network that offer direct services that align to the priority area of this year's competition are eligible.
- Multiple providers within a network are eligible to apply individually, and their application must be to address local direct care and not facilitation or support for the larger network.
- Support for costs used by the applicant organization and which might be used by / shared with other providers is usually ineligible. Shared use would generally need to be of nominal value and incidental.



Eligibility Requirements cont.:

Eligible Expenses (Budget)

- No more than 10% of grant funds can be used for **administrative expenses**
 - Include management general expenses and fundraising expenses (consistent with Form 990 (Part IX, Statement of Functional Expenses))
- 90% must be for **programs and direct services that align with the focus area.** Focus on those activities that achieve immediate/quick and tangible assistance

*Grants may be up to \$75,000 to support operations, programming, and/or capital projects.

Grant funds can not be use for the following:

- Work to influence public policy
- Sponsorships or annual events
- Fiscal sponsorships



IV. Application

Application content

- Award range (\$10,000 - \$75,000)
 - Budget
 - Budget narrative
 - *Requested budget can support operations (aligned to focus area), and project costs*
- Eligibility questions (covered in previous slides)
- Documents:
 - Organizational chart or staffing structure
 - Organizational operating budget demonstrating actual expenses (*\$2M)
- Most recent 990 form
- Narrative responses



Application cont.:

Be prepared to explain ...

- Community need esp. to engage with and support underserved populations
- Story of your organization –
 - indicators of your effectiveness
 - understanding of and connection to your community
- Reasonableness of request to achieve impact
- Alignment to priority area





V. Timeline

- April 8: Applicant Informational Webinar
- April 15: Application Opens (midnight)
- May 18: Application Closes (11:59 PM)
- Sept./Oct.: Outcome



Assistance and consultation available - please reach out, we are here to support you!

- peter@mtcf.org
- sarahv@mtcf.org



MONTANA COMMUNITY FOUNDATION

Questions



Peter@mtcf.org | Sarahv@mtcf.org



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helping you shape Montana's future through giving

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