

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.

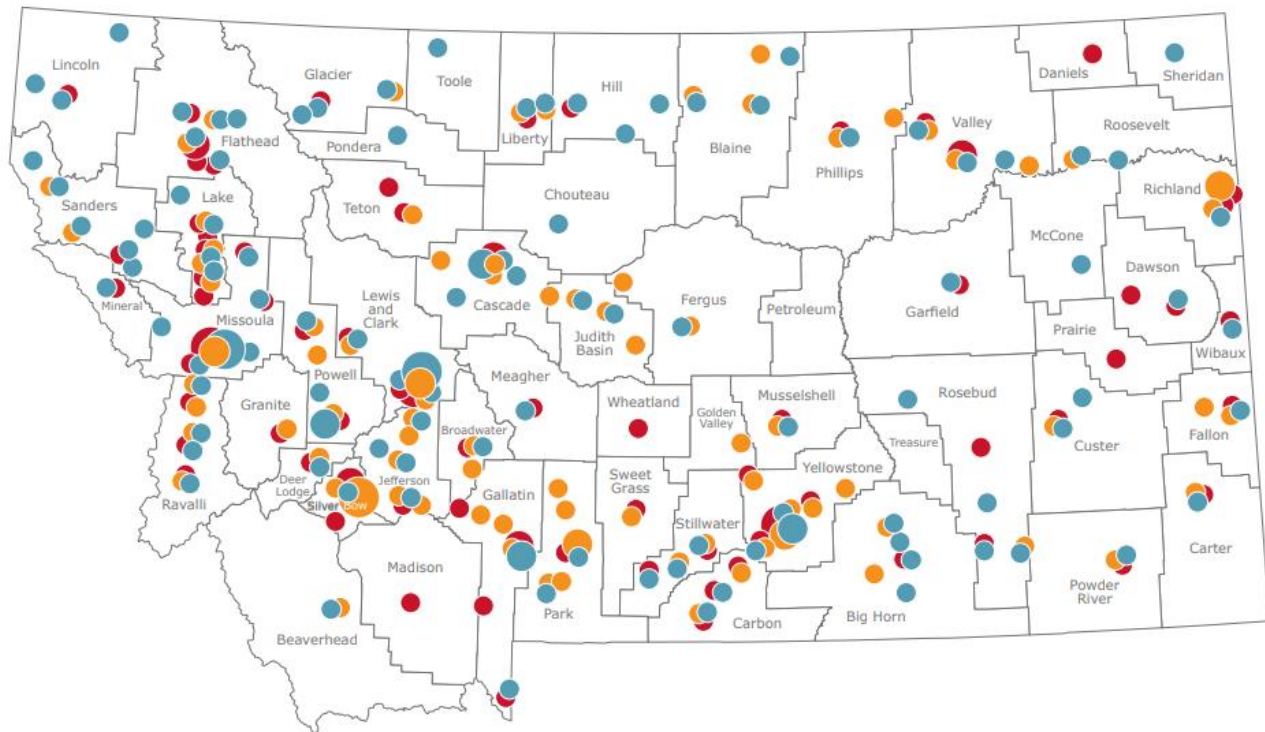
OBT: Established in 1944 by Otto Bremer, the trust is committed to ensuring its assets are put to work to support a better quality of life for people in the region it serves (Minnesota, Montana, North Dakota and Wisconsin).



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

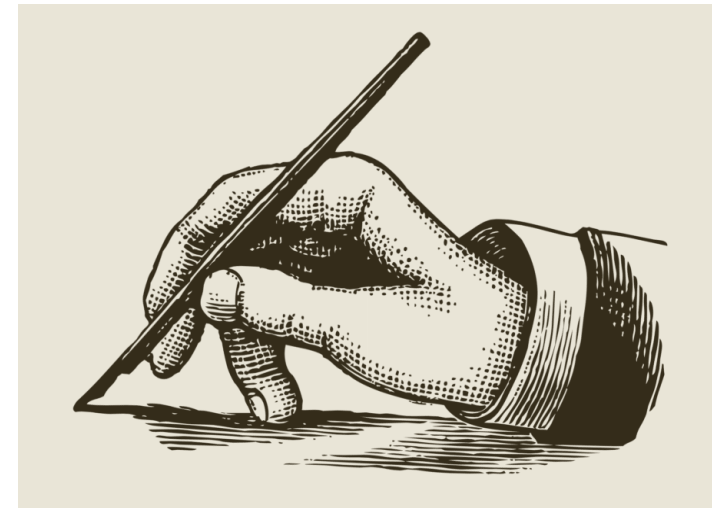
- Award range (\$10,000 - \$75,000)
 - Budget
 - Budget narrative
 - *Requested budget can support operations (aligned to focus area), and project costs*
- Eligibility questions (covered in previous slides)
- Documents:
 - Organizational chart or staffing structure
 - Organizational operating budget 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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