



MONTANA
COMMUNITY
FOUNDATION

Imagine

Montana's Transfer of Wealth

Linda Reed
President/CEO
Montana Community Foundation

Montana's Transfer of Wealth Opportunity



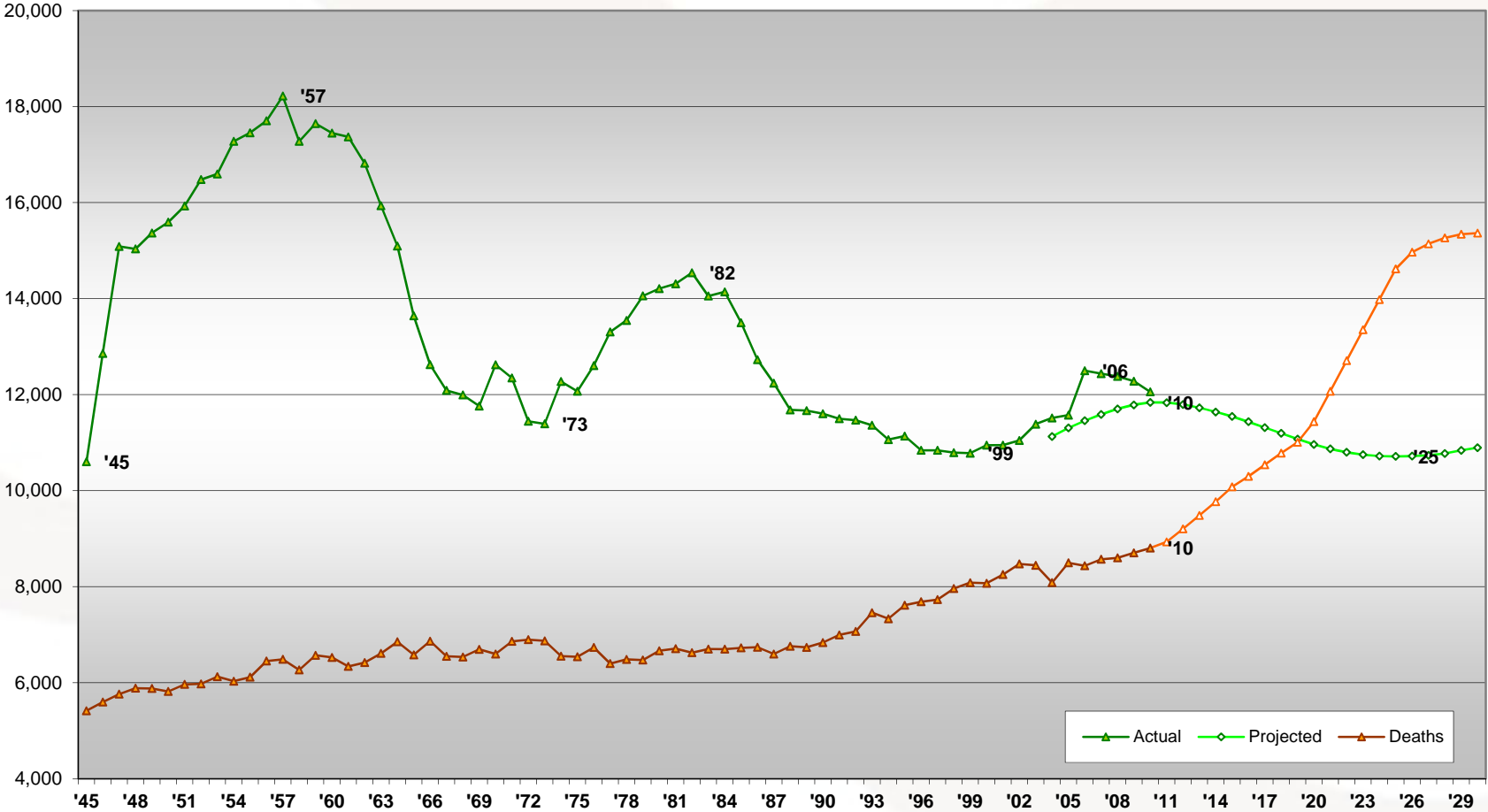


What do We Know?

- Montana is Aging

Natural Population Change

Annual Births in Montana - Actual (1945-2010) and Projected (2004-2030)

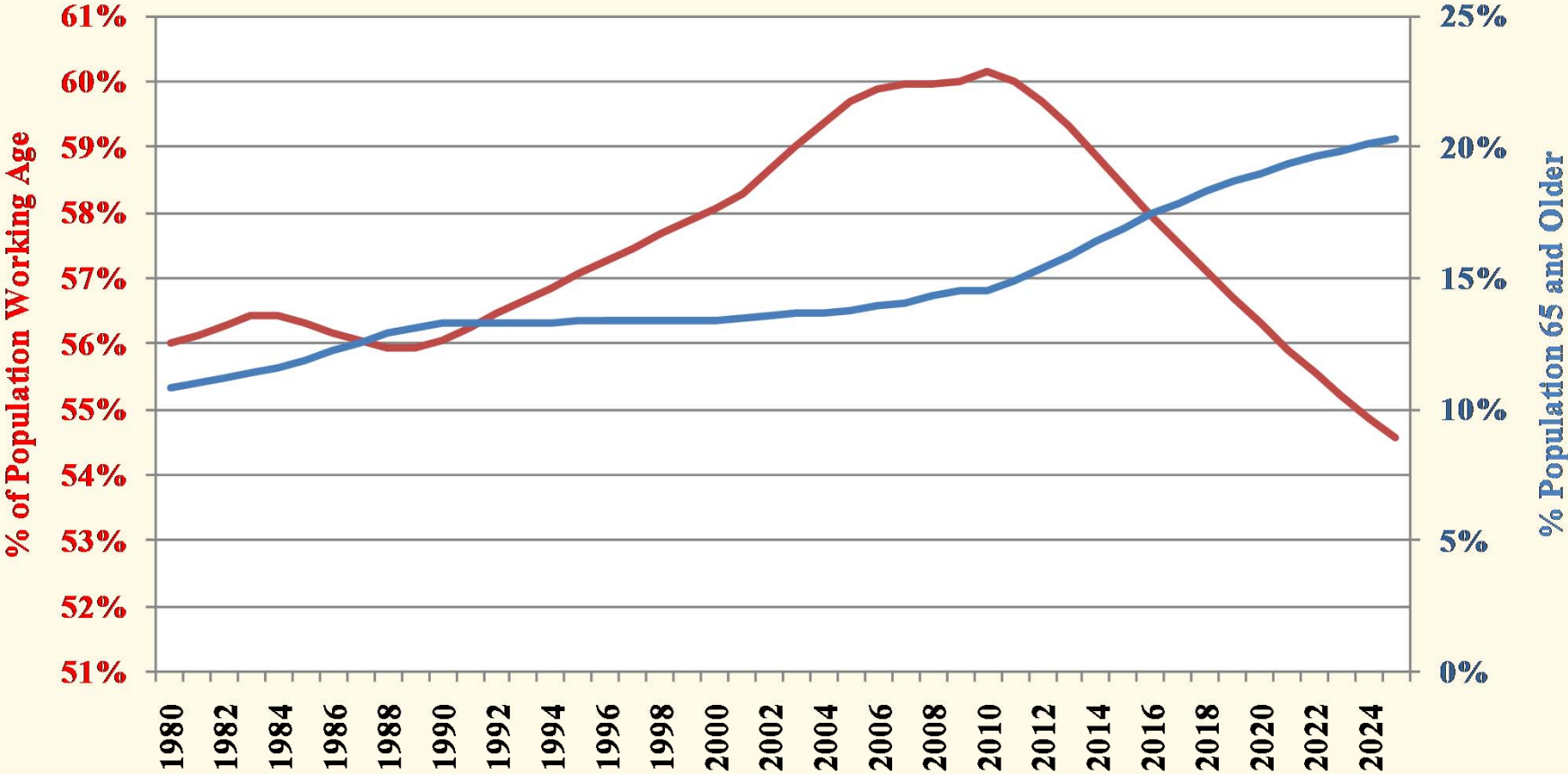


Source: Actual (Montana Vital Statistics, 2011) and Projected (births, U.S. Census Bureau, March, '05; deaths: Swanson)

What do We Know?

- Montana is Aging
- The Work Force is Aging

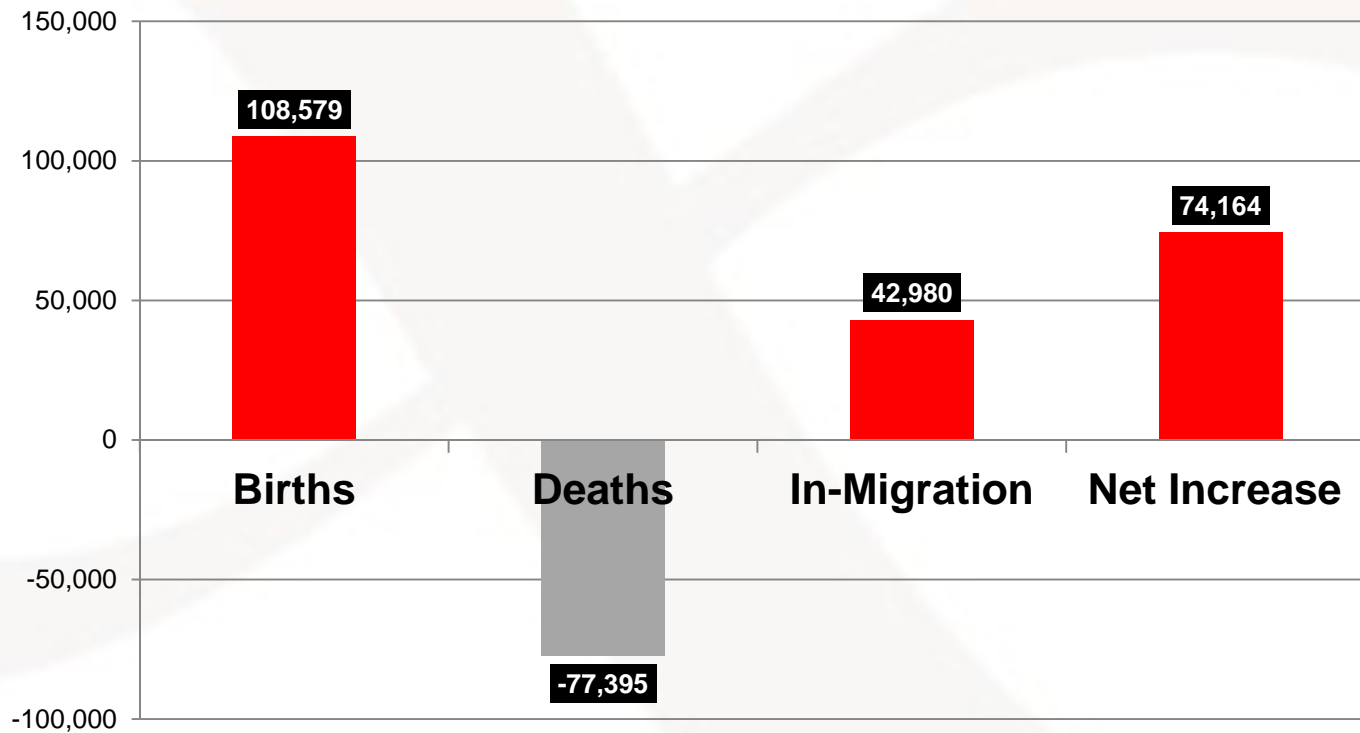
Demographics of Montana's Population



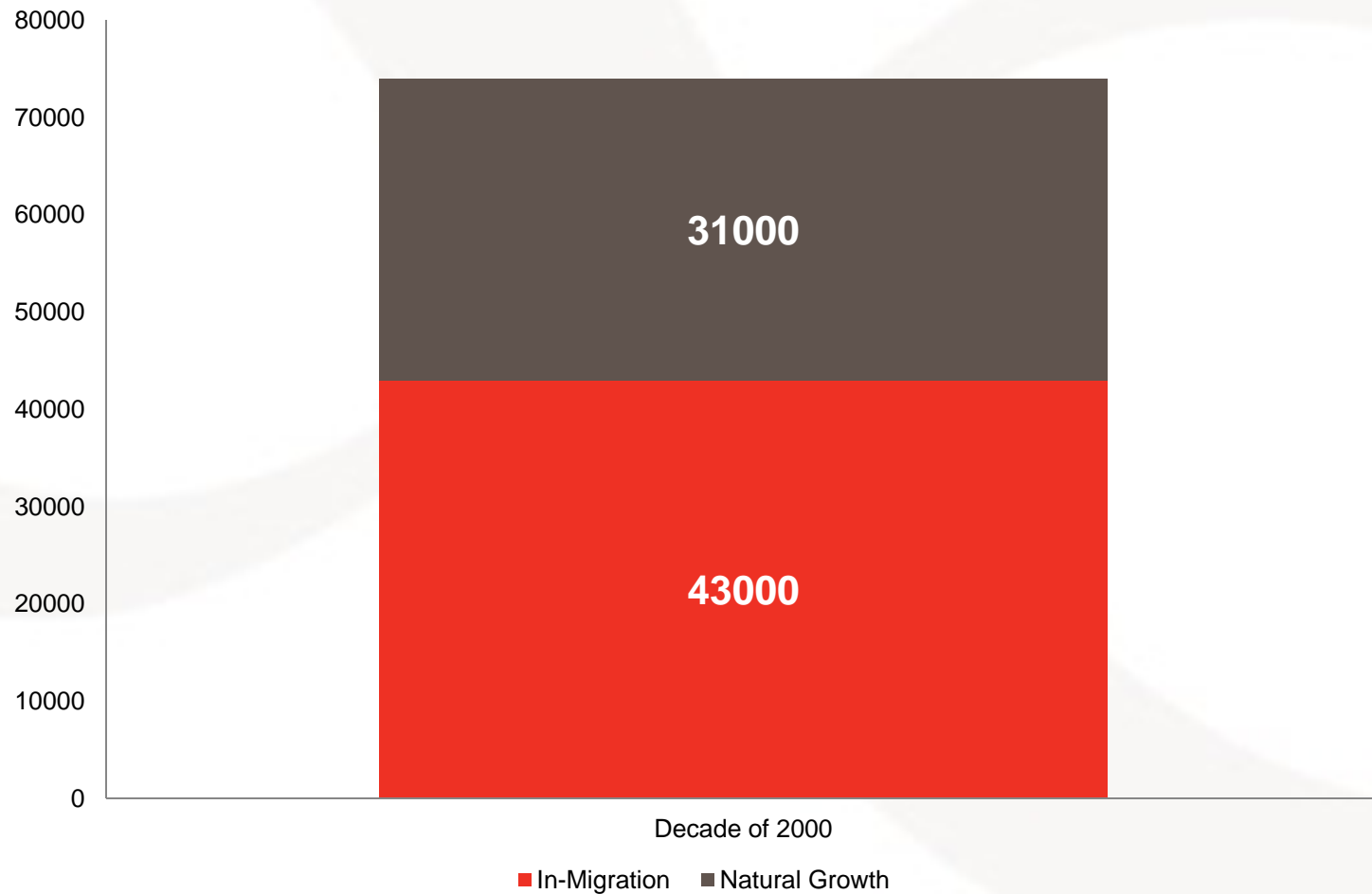
What do We Know?

- Montana is aging
- The Work Force is Aging
- Population Growth is Depended on In-Migration

Population Growth – Decade of 2000

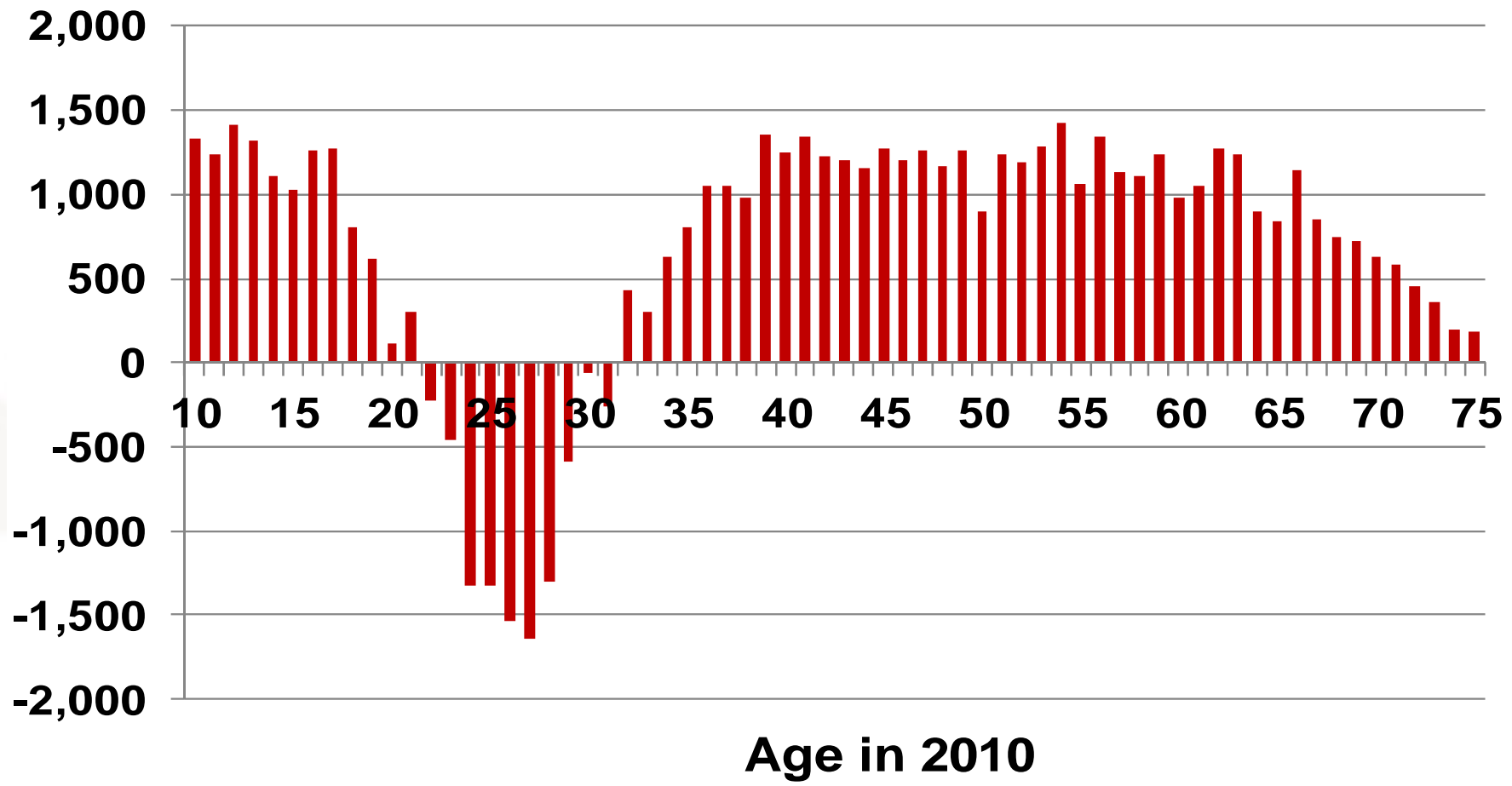


Population Growth Decade of 2000

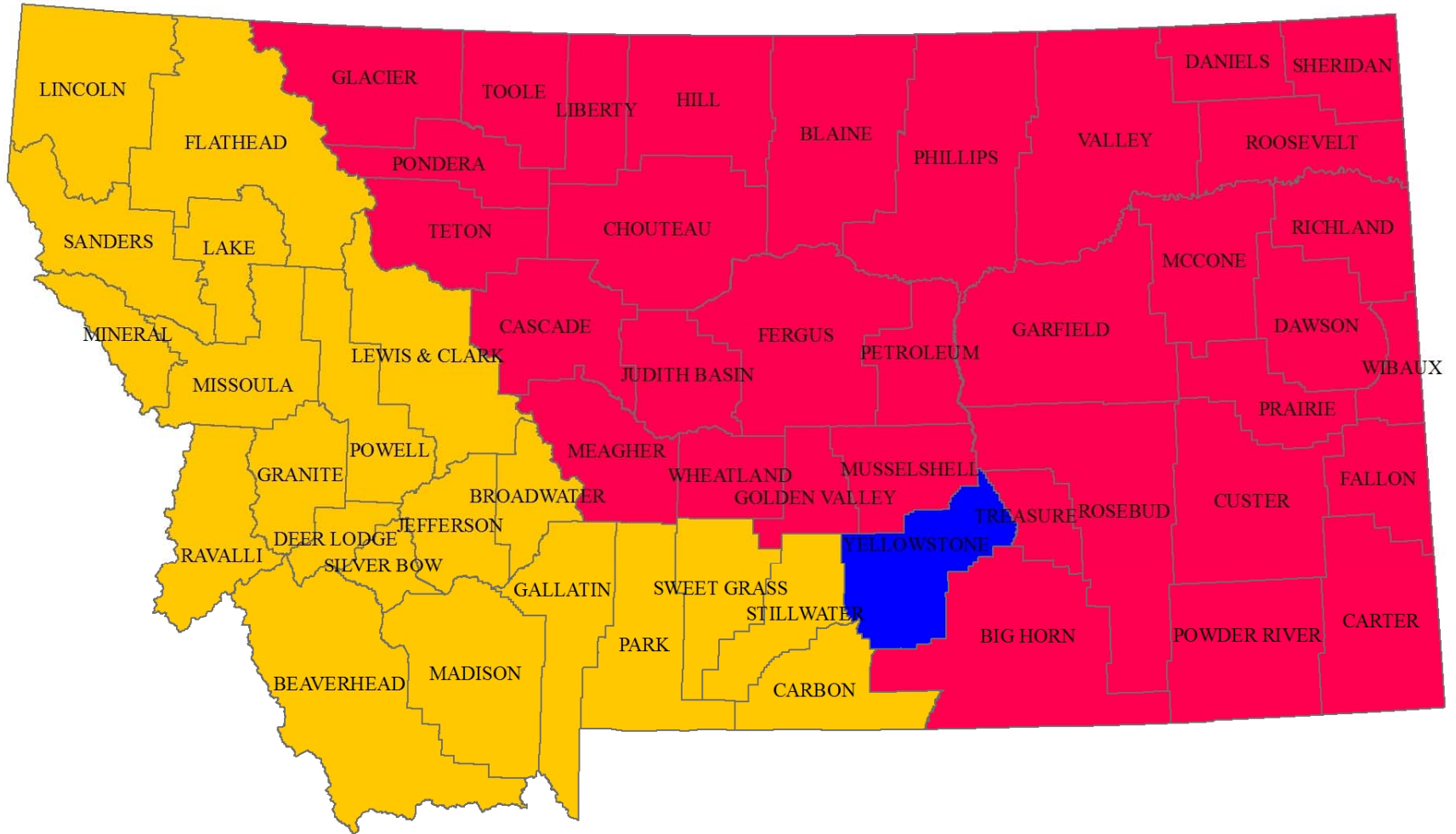


Net Migration

Montana 2000 to 2010

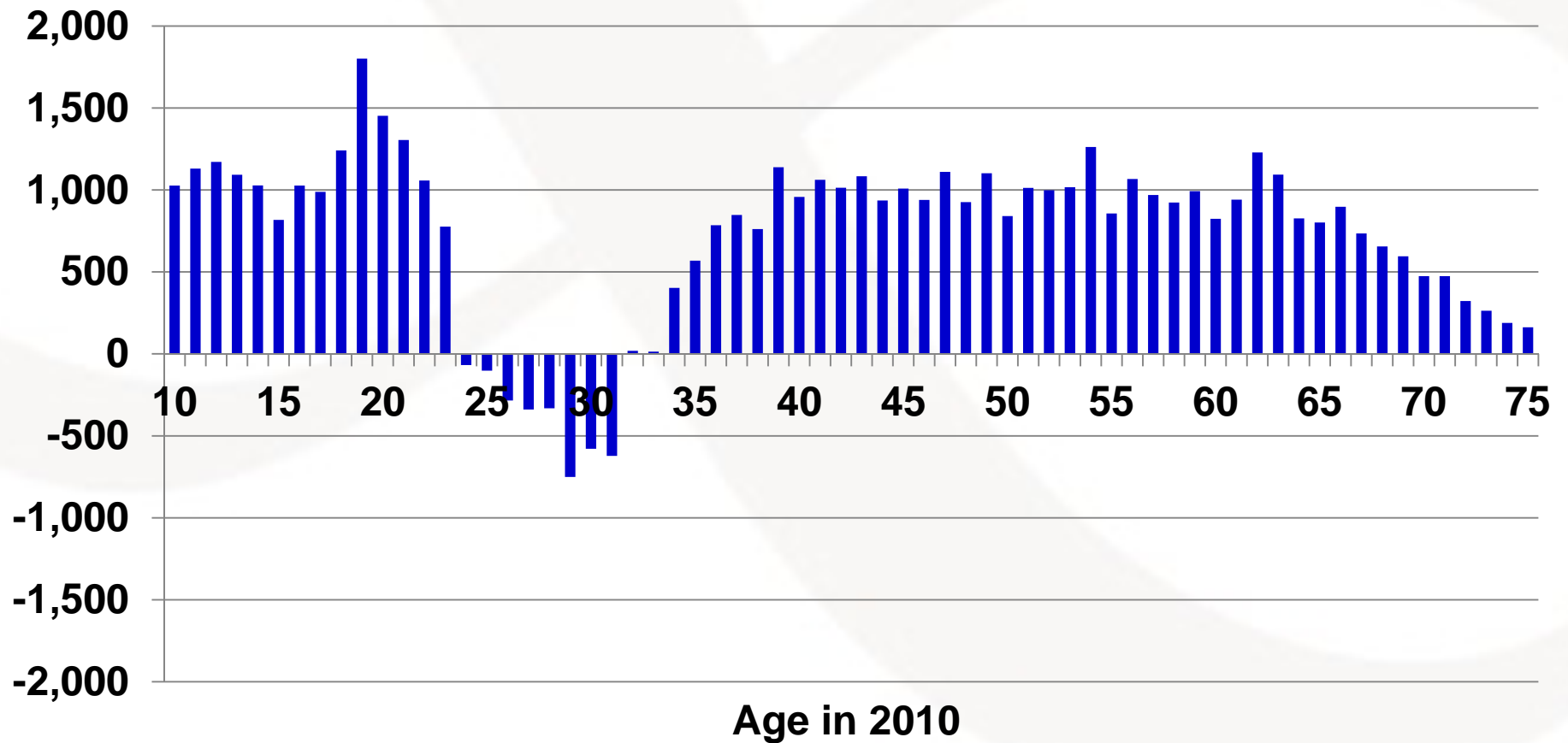


Sources: U.S. Census and CDC



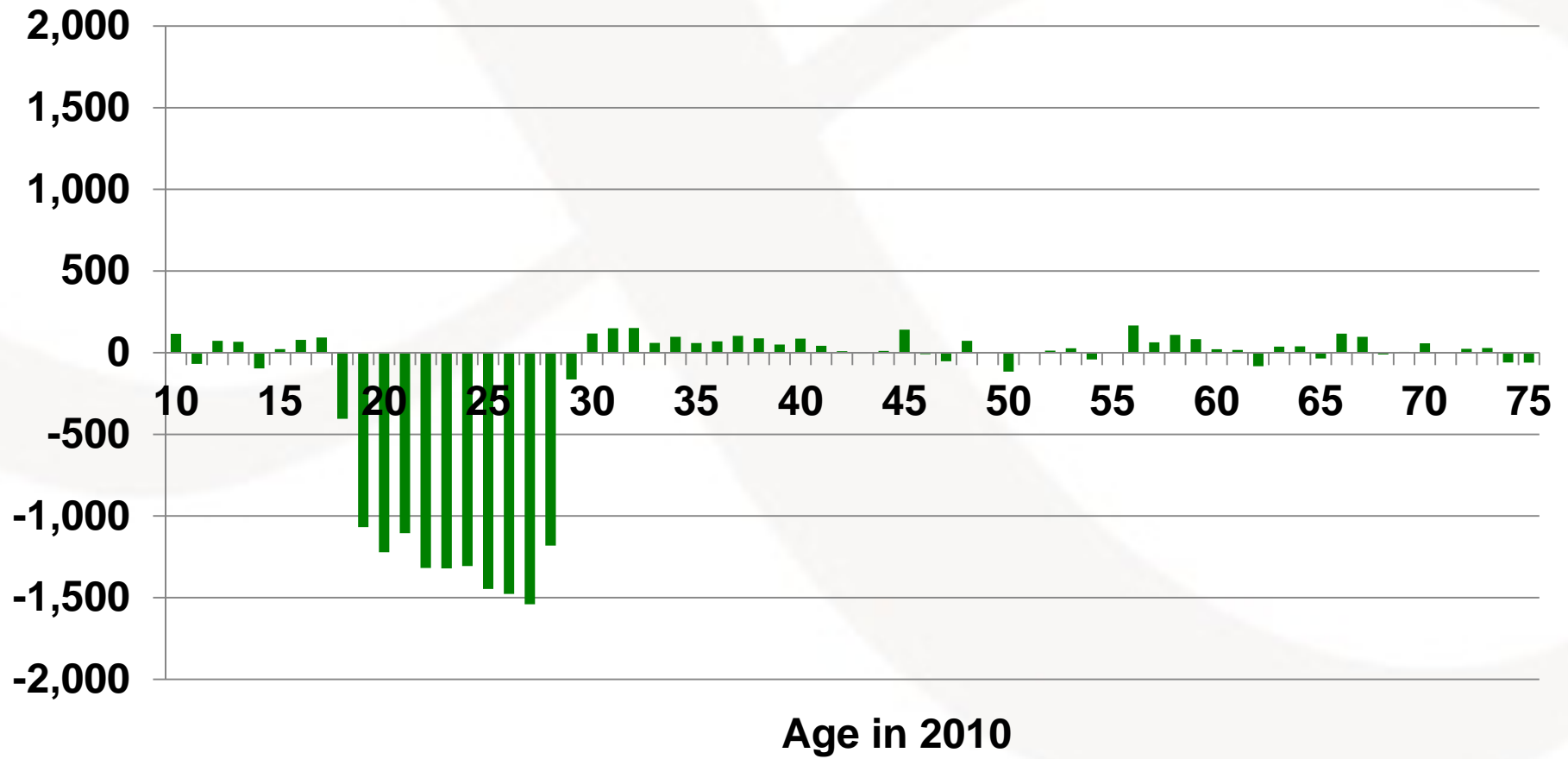
Net Migration

Western/Southern Montana 2000 to 2010



Net Migration

Eastern/Northern Montana 2000 to 2010



Sources: U.S. Census and CDC

What do We Know?

- Montana is aging
- The Work Force is Aging
- Population Growth is Depended on In-Migration
- Federal Money will Dry-Up

Custer County – Water System

Treasure State Endowment Program (TSEP)	\$750,000
Community Development Block Grant (CDBG)	\$450,000
Custer County (Applicant)	\$114,000
USDA Rural Development Loan	\$288,000
USDA Rural Development Grant	\$388,000
Project Total:	\$1,990,000

Cost per month per
user as funded:

\$39.50

Cost per month per user
with RD/CDBG at 75%:

\$44

Cost per month per user
with RD/CDBG at 50%:

\$48

Cost per month per user
with RD/CDBG at 0%:

\$71



What Does this Mean?







10 Year Transfer

Amount	\$12 billion
If 5% endowed	\$619 million
Yearly Grants	\$31 million

Custer County – Water System

Treasure State Endowment Program (TSEP)	\$750,000
Community Development Block Grant (CDBG)	\$450,000
Custer County (Applicant)	\$114,000
USDA Rural Development Loan	\$288,000
USDA Rural Development Grant	\$388,000
Project Total:	\$1,990,000

Cost per month per
user as funded:

\$39.50

Cost per month per user
with RD/CDBG at 75%:

\$44

Cost per month per user
with RD/CDBG at 50%:

\$48

Cost per month per user
with RD/CDBG at 0%:

\$71





Montana Community Foundations




- ★ Foundations affiliated with the Montana Community Foundation
- ★ Non-affiliated community foundations



Power of Locally Controlled Assets

- “A community-led approach that creates **locally controlled assets** and invests them to strengthen rural places. It builds a community’s ability to shape a better future and promote the well-being of all community members. It unites the tools of community, economic and resource development, engaging all people to come together with their ideas, strategies, talents, and giving.”

Source: Rural Development Philanthropy Collaborative

- 
- Locally made wealth
 - Left to the Local community
 - Invested in Local project
 - By Local community members