

Executive Summary
**“Philanthropy and Rural America:
An Agenda for the 21st Century”**

August 7- 9, 2007
Missoula, Montana

Background: The Council on Foundations, the Montana Community Foundation and the Northwest Area Foundation --in partnership with the National Rural Funders Collaborative, Philanthropy Northwest, the Association of Small Foundations, and others -- convened a summit on philanthropy and rural America at the encouragement of Senator Max Baucus (D- Montana). Philanthropic leaders, practitioners, and rural policy experts gathered to address the challenges and opportunities currently facing rural America. Almost 200 participants attended. This first conference of its kind was a resounding success based upon the level of participation, the engagement of those in attendance, and the diversity of the discussions.

The genesis of the conference was a speech delivered by Montana’s Senator Max Baucus at the 57th Annual Conference of the Council on Foundations held in Pittsburgh in May 2006. Senator Baucus, now chair of the Senate Finance Committee, urged the philanthropic community to do more in rural America. In Missoula, Montana’s Governor Brian Schweitzer and the Council’s President, Steve Gunderson opened the conference. In his remarks, Gunderson set the stage for philanthropy’s role in rural America when he said:

At the end of these three days together, I hope we can accomplish the following:

1. *We can articulate philanthropy’s role in building America’s future.*
2. *We can learn from each other’s unique, innovative, and effective strategies using philanthropy to enhance the common good in rural America.*
3. *We can articulate the potential partnerships between:*
 - *philanthropy and the public sector*
 - *philanthropy and the private sector.*

In the end, I do not believe we achieve these goals through a simple redistribution of existing philanthropy. Rather, we do so by making a total commitment to grow philanthropy in rural America while growing philanthropy’s role in service to the rural life we celebrate.

Senator Baucus presented a comprehensive look at the challenges and opportunities for philanthropy in rural America during his keynote address on the final day of the conference. He asked the philanthropic sector to consider:

1. Making it a priority to work together with local, state and regional partners;
2. Investing in local community foundations;
3. Investing in rural nonprofit infrastructure;
4. Revising your guidelines for investment to accommodate rural organizations.

At the conclusion of his remarks, the Council's President and CEO committed philanthropy to full and serious consideration of his recommendations.

The conference began with "snapshot" reports on the status of six topical areas:

- Natural Resources and the Environment
- Community Philanthropy
- Individual and Family Assets
- Economic Development
- Health and Wellness, and
- Education

On August 6th and August 8th, participants chose to attend site visits around the State of Montana looking at specific aspects of the issues under discussion. Site visits included:

- Browning: A Blackfeet Reservation and its junior college
- Seeley Lake; a former mining community, now with a growing vacation community
- Helena: Arts and Culture, and a residence arts community
- Libby, Montana: A community facing an environmental Superfund calamity
- Arlee: "Grow Montana:" Growing and processing agricultural products in Montana
- Camp Vandenberg: An inter-generational Native American Summer Camp
- Lewistown: A Community at the Crossroads

The final day of the conference, participants broke into working-groups to begin building An Agenda for Philanthropy and Rural America in the 21st Century. The breakout groups included the first six topical areas covered earlier, plus

- Arts and culture
- Housing
- Technology and
- Growing Philanthropy in rural America.

Each group reported on the most urgent issues of each topical area in the afternoon. All ten groups submitted more substantive reports following the conference.

Key Recommendations: A number of themes and issues ran through many group reports. These common themes shall serve as the key elements of a broad-based agenda while recognizing that most recommendations will find appropriate missions within respective topical areas. Our priority recommendations for the Agenda include:

- Conduct a national transfer of wealth study for all 50 states, and use this information to build both the message and the technical basis to grow philanthropy in rural America. Strategies for growth include:
 - Finding consensus on how best to define "Rural America in the 21st Century;"
 - engaging those already working in rural America in collaborative efforts;
 - building capacity for rural programs;

- identifying and nurture emerging and next generation leaders to ensure that rural issues will have champions;
 - finding the right templates and best practices for solving problems in rural America.
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- Work to enact and implement the “Low Profit Limited Liability Company,” (L3C) legislation at both the state and federal levels, providing a new tool for program related investments that will bring needed new capital to rural America.
 - Use this conference as the platform for an active sector-wide commitment to grow philanthropy’s role in building a positive future for Rural America. Among the options suggested for additional activity were extensive education of both the challenges and opportunities for rural America’s future; partnership with infrastructure organizations (NRFC, Regional Associations, Association of Small Foundations, Regional Associations, etc.), to advance a broad-based agenda; convene a second Rural Conference in 2008; and/or ensure that the discussion of Rural America is a topic at the Council on Foundations’ 2008 Conference: “Philanthropy’s Vision: A Leadership Summit.”
 - Engage those present in rural America, but not currently active in the conversation, to help identify and address current needs and to affect change, (including young people, immigrants, and seasonal residents.)

Following this Executive Summary please find the top 2007-2008 issues for “Philanthropy in Rural America” as created by each of the respective working groups. The recommendations which follow reflect the specific work of each individual group, and the priorities they created within their area. This comprehensive list does not represent an Agenda for either the Council or the philanthropic field. Rather, it should serve as a reflection of the items important to those within each topical working group. This series of recommendations will serve as both a background and a guide for the Council’s Advisory Committee on Philanthropy and Rural America as they determine appropriate next steps.

The working documents each group submitted at the conference will be available on the Council on Foundation’s website in early September, 2007.