

## **Resources are Essential for Implementation**

Montanans around the state are working hard to prepare for the Bicentennial in critical ways. Community infrastructure and services, beautification, outdoor amphitheaters, site preservation, reenactments, public safety projects and many other projects are well under way. However, as depicted in the previous chapter, more than \$30 million has been requested for "top priority" Tier I projects alone. Another \$9 million is needed for "other" Tier I projects, and an additional \$30 million is estimated to accomplish Tier II projects. In a world of limited resources, it is unlikely that \$60-\$70 million will be found to complete all proposed projects. So prioritization is essential.

In order to maximize the potential resources that are available, Bicentennial fundraising must be approached strategically. There are six key resources from which funding and other assistance will be sought:

- ◆ Business and corporate sponsors
- ◆ Foundations and grants (private, federal and state)
- ◆ Montana Legislature
- ◆ Congress
- ◆ National licensing and sponsorship program (led by National Council)
- ◆ Special fundraising projects

Each of these potential resources will be discussed briefly in this section. In order to be successful in obtaining funding from any of the above sources, it is important to understand the factors that motivate their giving. Each has unique motives, or needs, and those needs must be met for a funding transaction to take place.

## **Business and Corporate Sponsors**

The fastest and cleanest way to raise funds quickly is from the private sector. Very little paperwork is required (in general), and long-term relationships can be established without a lot of bureaucracy or fuss. The key is to remember that business sponsorships are marketing investments – not charitable donations. The funding arrangement is a business transaction, and should be approached, negotiated and handled as such. Businesses expect something in return for their investment, whether it

## **Chapter VIII:** **Fundraising**

- ❖ Business Sponsors
- ❖ Grants
- ❖ Legislature
- ❖ Congress
- ❖ Special Projects
- ❖ Resource Allocation

is direct product sales, advertising, customer mail lists, public relations, event tickets, media exposure or a combination.

Bicentennial project sponsors need to evaluate their projects to determine what marketable qualities, or assets, those projects produce, and how those assets might be packaged and sold to potential sponsors. Since each sponsor is different, some research is needed to determine the types of projects or events they tend to support. If businesses are provided appropriate recognition and marketing benefits, many will welcome the opportunity to become an "official sponsor" of a Bicentennial event or project.

In July 2000, a two-page Business Opinion Questionnaire about the Bicentennial was mailed to 107 top businesses in Montana under the signature of Governor Racicot. The results revealed that a significant number of businesses are committed to ensuring the success of the Commemoration. Business owners and CEO's indicated a willingness to support the Bicentennial both financially and through in-kind services.

While the majority of business survey respondents indicated a desire to participate in a successful Commemoration, only a fraction of them expressed willingness to commit more than \$10,000. To increase that amount, businesses must be convinced of the return on investment – that to invest in the Bicentennial is a competitive investment against other ways that those marketing dollars might be spent.

## **Foundations and Grants**

America's healthy economy has fueled unprecedented levels of money flowing into private foundation coffers. In many ways, the prospects of Bicentennial funding from foundations and grants is much brighter than federal or state appropriations (although those avenues should be pursued as well). Fundraising in this manner requires some grant making skills (research, persuasive writing, follow-up, etc.), the payoff can be well worth the investment. Foundations often seek "prototype" or highly visible projects (from educational projects to health care to historic preservation) so that their names and contributions are well-known. Unlike business sponsors, foundations and grants often do not have flexibility in timing – many offer grant applications and financial awards only annually or a few times a year. Appendix J lists many potential resources for funding and technical assistance.



Bitterroot Flower

## Montana Legislature

The Montana State Legislature authorized the Montana Lewis & Clark Bicentennial Commission in 1997. The Commission receives operational funding through annual grants from Travel Montana using Accommodations Tax Revenues. Ongoing funding should be sought for specific programs that benefit a broad spectrum of citizens, businesses and projects. Examples are the Commission's grant program, public safety/EMS assessments and upgrades, community infrastructure assessment, and land acquisition to preserve endangered Lewis & Clark sites. A bill will be introduced in the 2001 session for a Bicentennial license plate, and the revenues will benefit both statewide and local projects and programming. Besides direct support to the Commission and Historical Society, the Legislature has supported Bicentennial funding through Travel Montana, the Department of Transportation, the Department of Fish, Wildlife & Parks, and others. Specific appropriations also might be sought for key infrastructure and safety-related programming.



Clark's Lookout State Park

## Congress

Through the National Lewis & Clark Bicentennial Council, and strong working relationships with state congressional representatives, projects and needs in Montana have been presented to Congress. The Commission and Executive Director should continue to strengthen these relationships, providing information as requested and providing input on policy:

- ◆ Inform re. strategic policy decisions
- ◆ Request support of state/national strategy
- ◆ Encourage increased agency budgets (seasonal staff, assessments, facilities)
- ◆ Fund agency re-grant programs for communities
- ◆ Direct appropriations for projects

## National Licensing and Sponsorship Program



Lewis & Clark at Three Forks –  
E.S. Paxson

Courtesy of  
Montana Historical Society

The National Lewis & Clark Bicentennial Council is negotiating with a national marketing firm to develop and manage a national product licensing and sponsorship program. The Montana Commission and planning team have actively sought to ensure that a portion of the revenue raised from licensing fees and sponsorships will be distributed to the Trail states for Bicentennial projects. The Commission also will actively encourage Montana businesses and event planners to take advantage of the national programs if desired.

## Special Fundraising Projects

The magnitude and visibility of the Commemoration provides fertile ground for creative entrepreneurs to develop unique products or fundraising ideas. If these individuals desire the Commission's endorsement, or they wish to be a sponsor of the Bicentennial in Montana, the Commission will welcome the opportunity to consider proposals. Proposals will be evaluated based on the criteria defined in Chapter III, and each will be handled on an individual basis.

## Resource Allocation to Tiered System

In the near term, most Bicentennial preparation and resources will be focused on high priority Tier I projects that have statewide or national significance, and provide lasting legacies for Montanans. However, as the top priority projects are completed, more resources will be available to support Tier II and III projects. The planning team envisions an allocation of resources to the three tiers over the next few years as follows:

		Year		
		<u>00-03</u>	<u>03-04</u>	<u>05-06</u>
Tier I:	Proactive	75%	50%	35%
Tier II:	Responsive	20%	30%	35%
Tier III:	Opportunistic	5%	20%	30%

## **Appendices:**

(All Submitted Separately)

- A: Bicentennial Tier I Project List
- B: Bicentennial Tier II Project List
- C: Historic Preservation Projects
- D: Education & Communication Projects
- E: Community Development Projects
- F: Resource Management Projects
- G: Business Development Projects
- H: Endorsement Guidelines
- I: Lewis & Clark Web Sites
- J: Potential Resources
- K: Business Survey
- L: Commission Enabling Legislation