



Nonprofits by the Numbers

A DATA-DRIVEN DISCUSSION OF
NONPROFIT IMPACTS & ISSUES



Our Agenda for Today:

1) First Hour: Presentation of the Numbers

- 1) Overview of the Nonprofit Sector
- 2) Federal Policy and Impacts
- 3) Charitable Giving
- 4) State Conditions and Policy

2) Second Hour: Facilitated Discussion

- 1) Q&A, Table Convo, Group Convo

3) Third Hour: 1-on-1s with Congressional Staffers (by appointment only)



What we want you to hear today:

1) **Overview of the data and MNA insights**

- 1) Sector snapshot
- 2) Federal Policy and Impacts
- 3) Charitable Giving
- 4) State Economic Conditions
- 5) State Policy and Impacts

2) **Summaries and messages that you can share with your community about sector-wide needs.**

3) **MNA's response to top issues.**



What we want you to know today:

The only constant is change, but your mission has never been more important

Lead with curiosity, consistency, and community

Your VOICE Matters



What we want you to know today:

**Whatever you are doing to make
Montana better, keep doing it.**

We need you.

This state needs you.

It matters. It all matters.



Data Sources:



**Giving
USA™**
Shared intelligence.
For the greater good.

A public service initiative of The Giving Institute



**BUREAU OF BUSINESS AND
ECONOMIC RESEARCH**
UNIVERSITY OF MONTANA

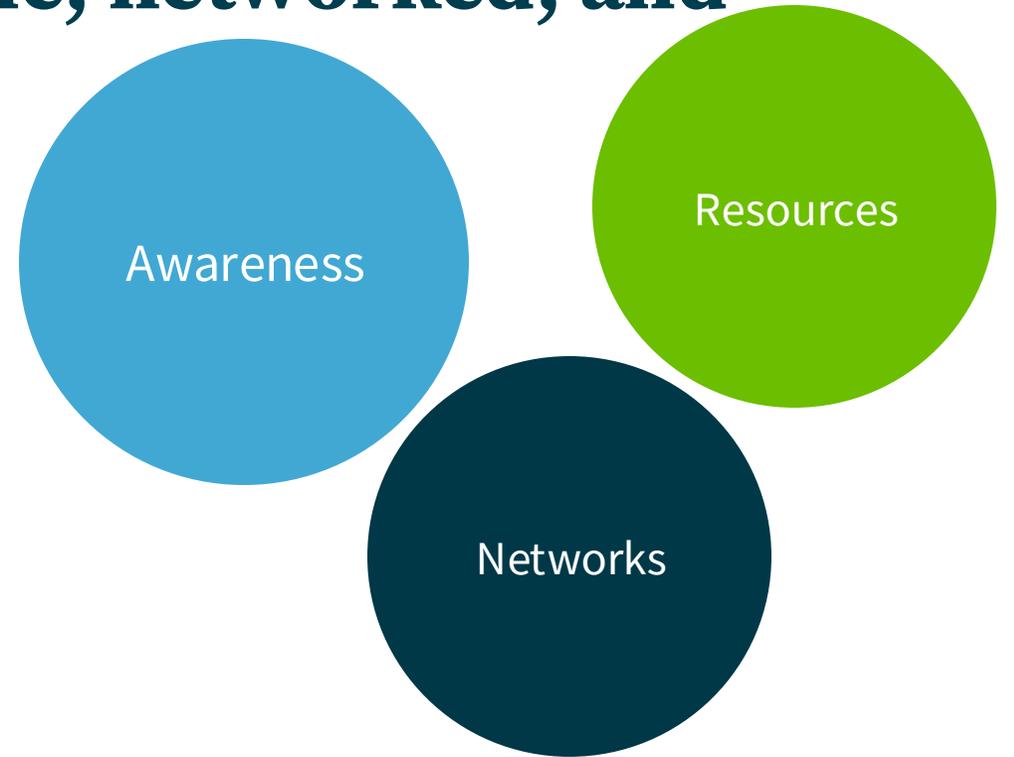


**All sources and slides can be found on
our NxN Resource Page**



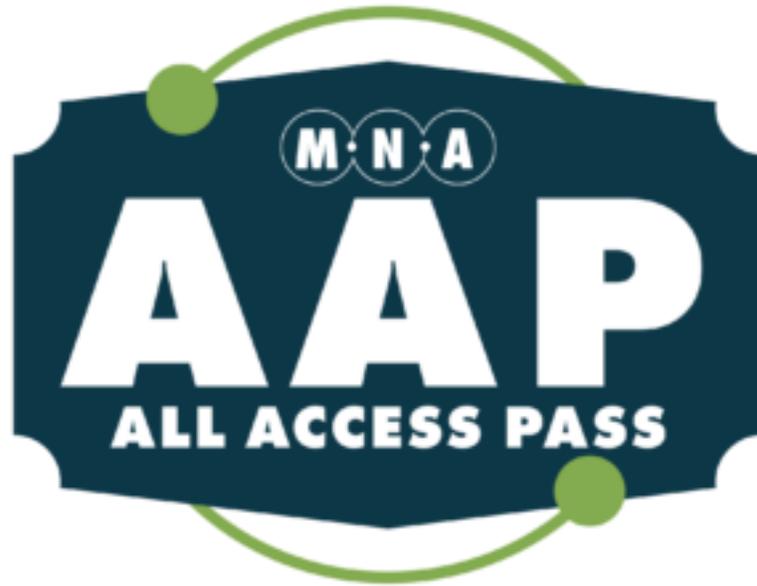
OUR MISSION:

Provide leadership for Montana's nonprofit sector and partner with charitable nonprofits to promote a sustainable, networked, and influential sector.





MNA Updates





MNA Updates



**Monday, February 16 -
Thursday, February 19
@ 1-2 pm**





Overview of the Sector





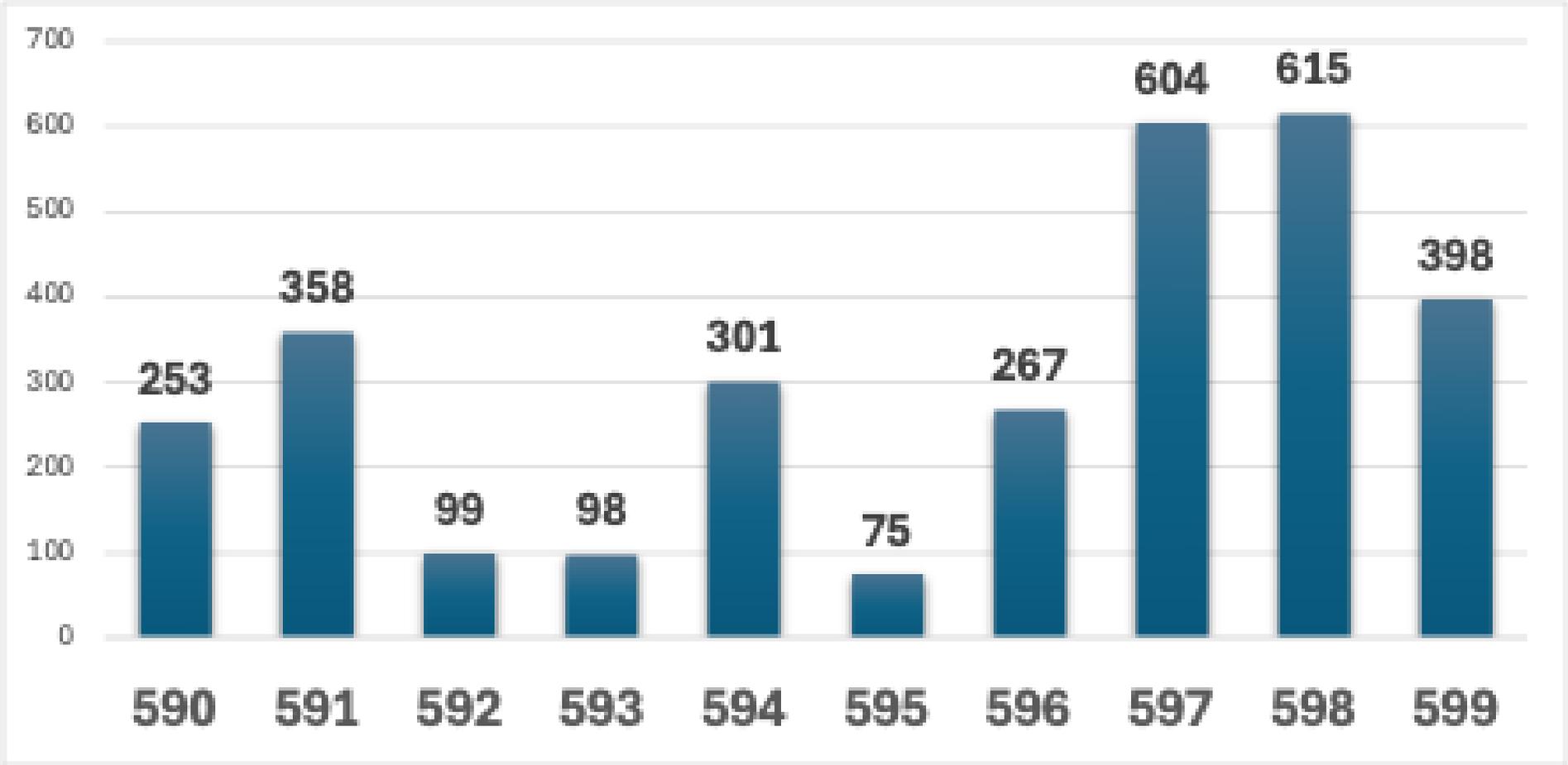
Key Messages to Share

- **2/3rds of staffed nonprofits in Montana have budgets below \$500,000.**
- **\$2M-\$5M budgets are rare, but more common in MT cities.**
- **Starting to see more of a fracturing between organizations with resources and those without.**



Montana Nonprofits – The #s

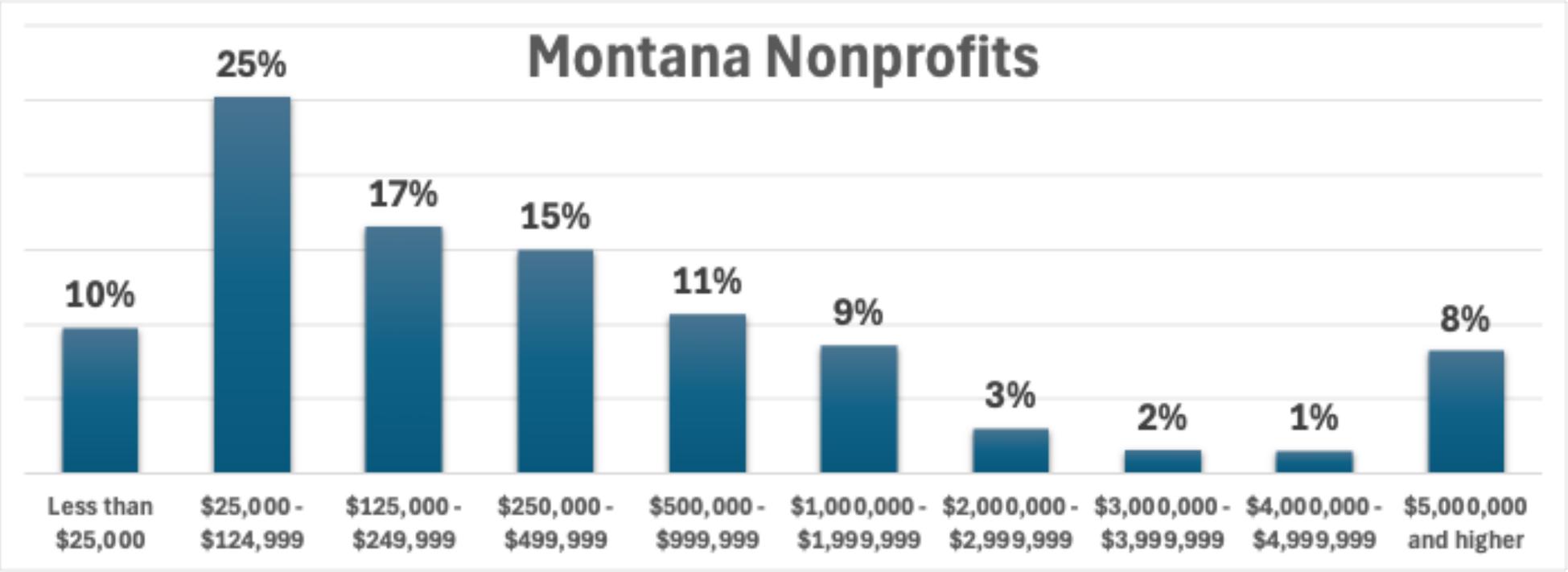
Total nonprofits by zip code prefix



Source: IRS Exempt Organization Master List, 2026



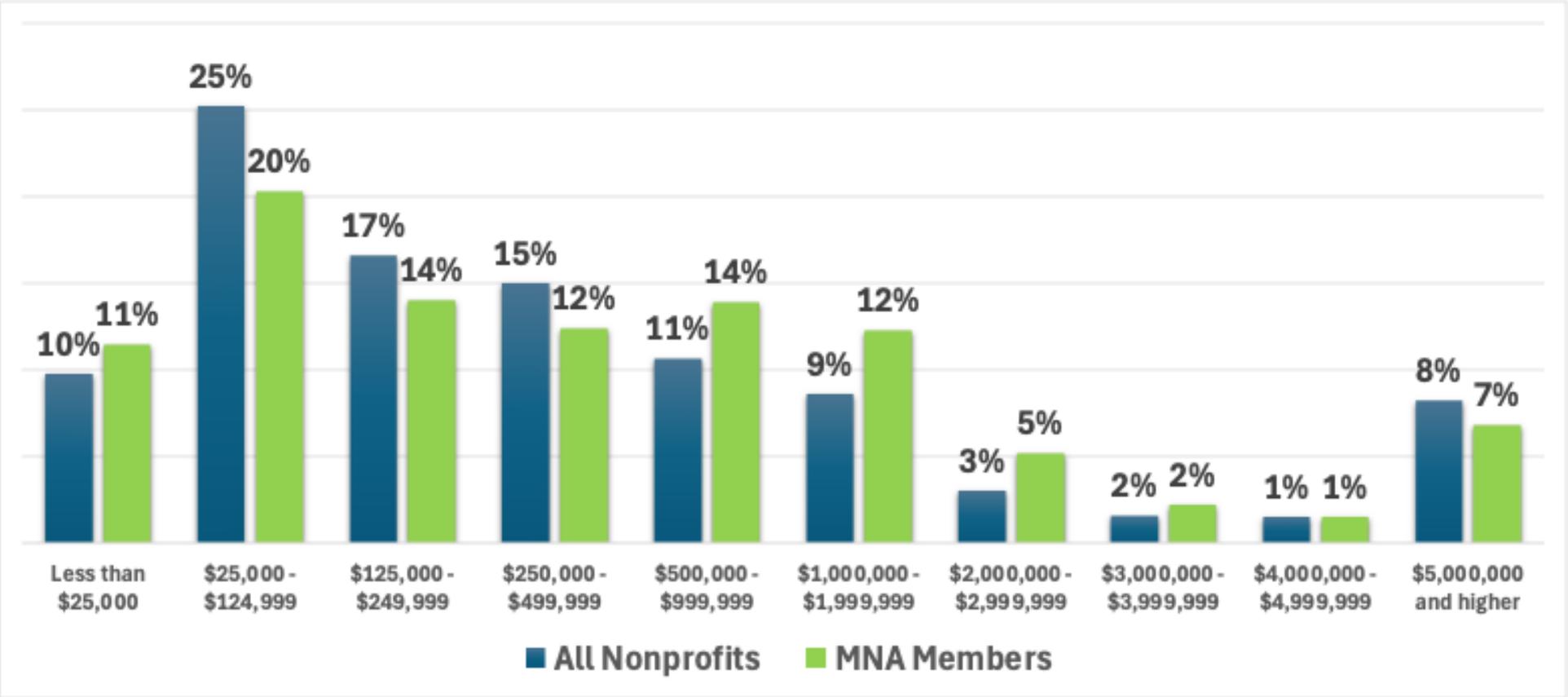
Montana Nonprofits – The #s



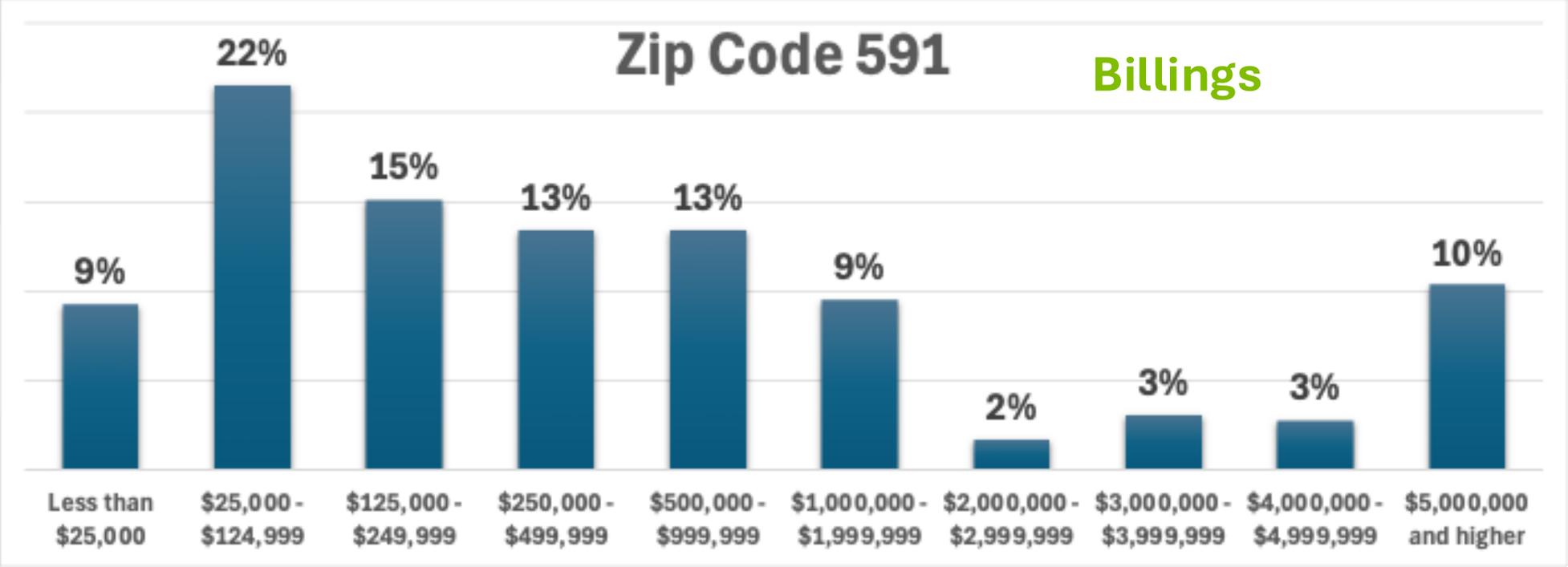
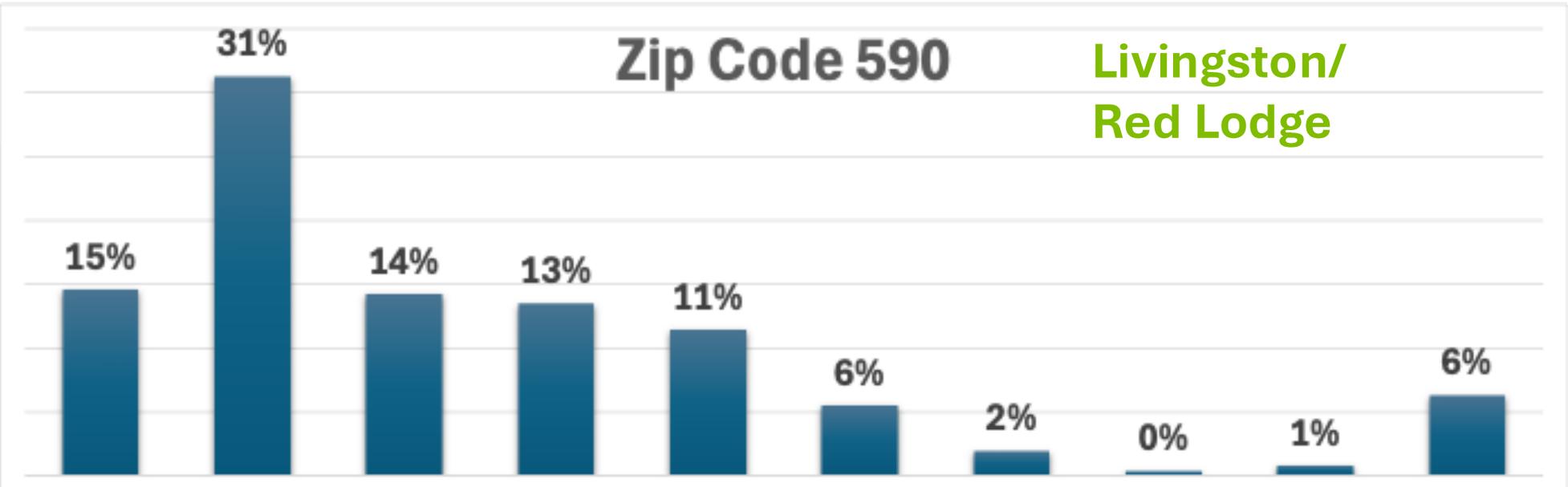
Source: IRS Exempt Organization Master List, 2026



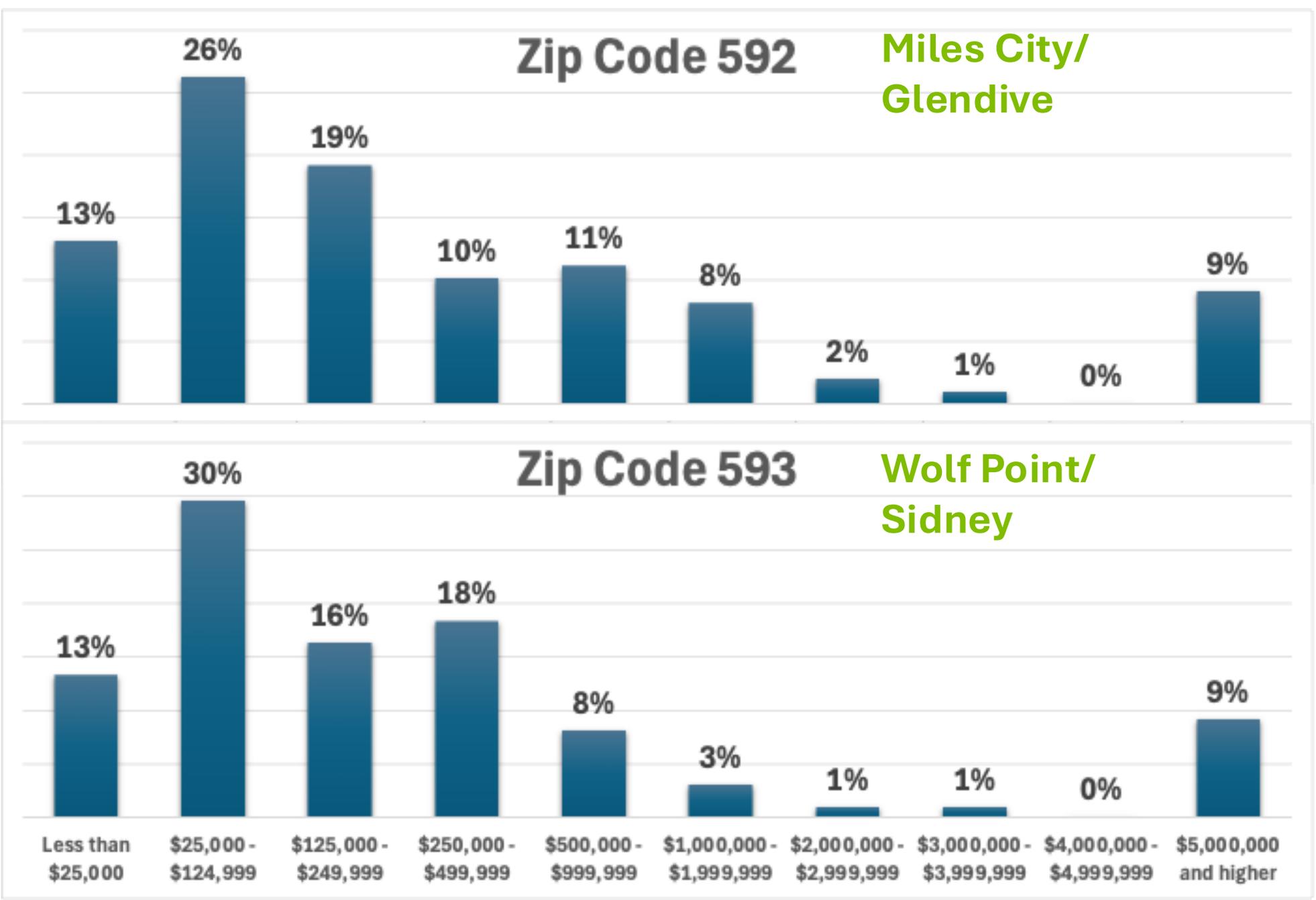
Montana Nonprofits – The #s



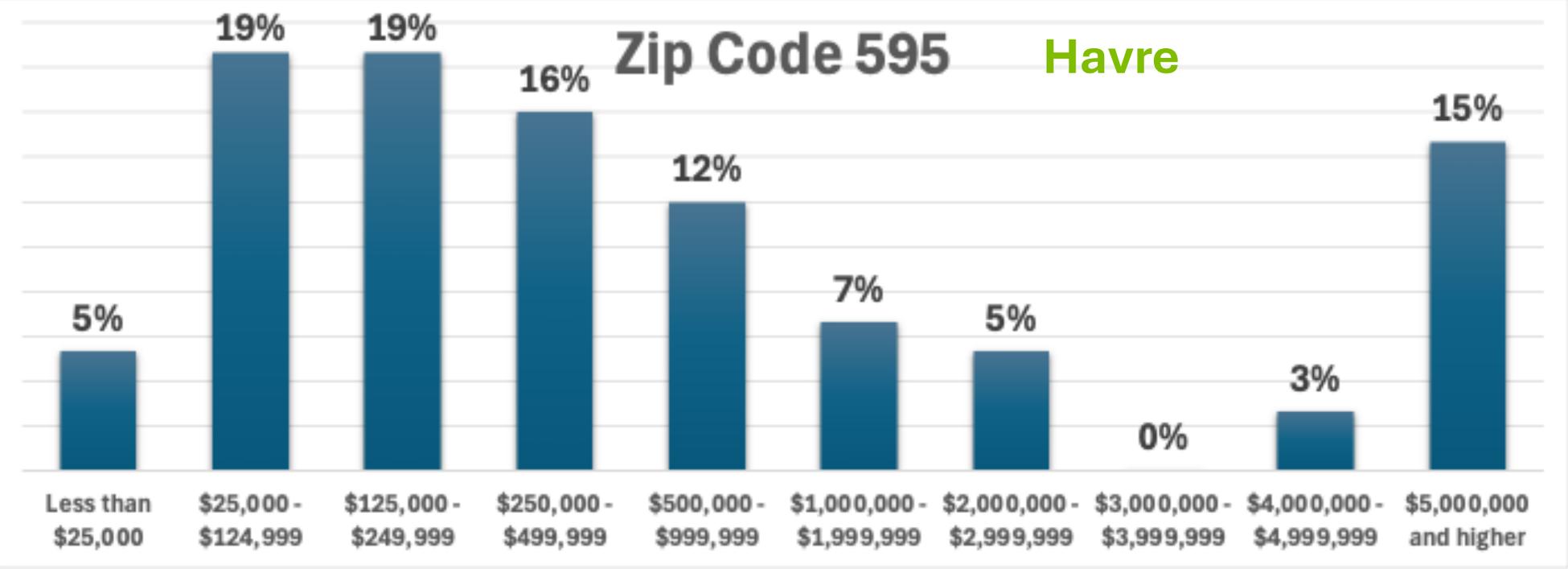
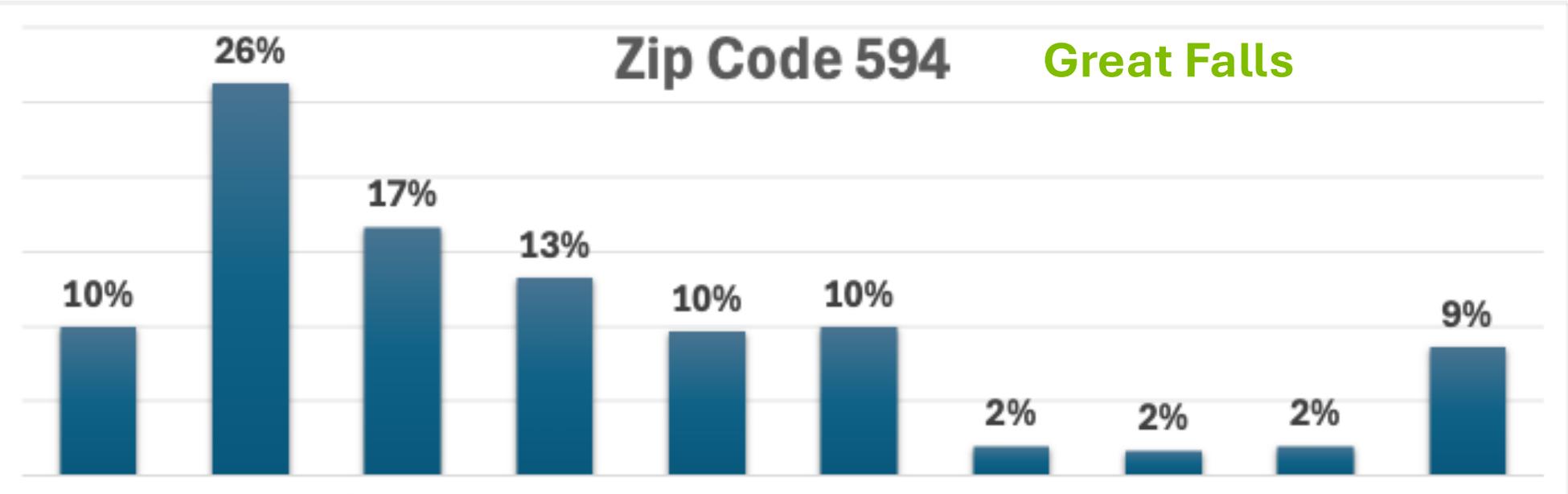
Source: IRS Exempt Organization Master List, 2026



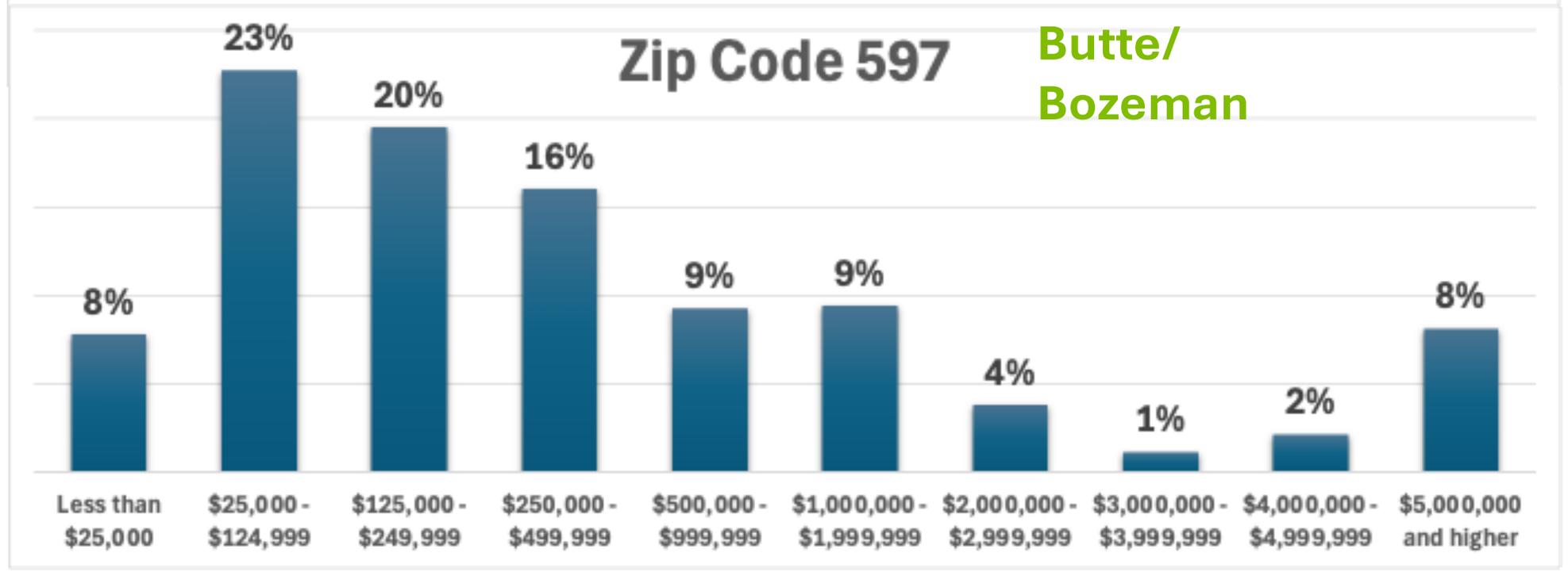
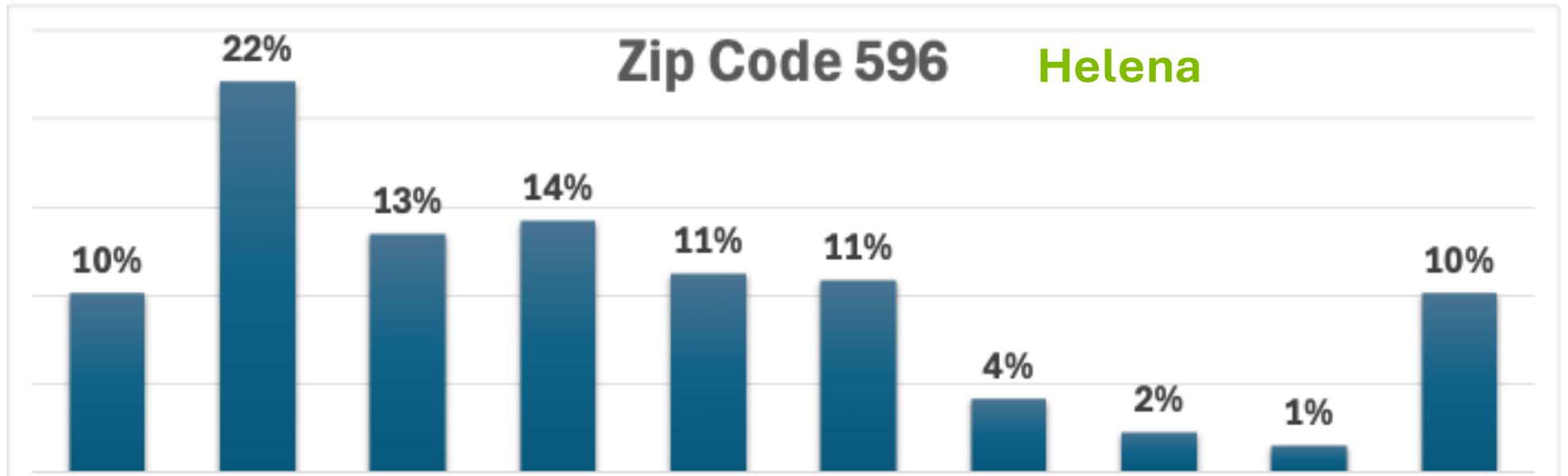
Source: IRS Exempt Organization Master List, 2026



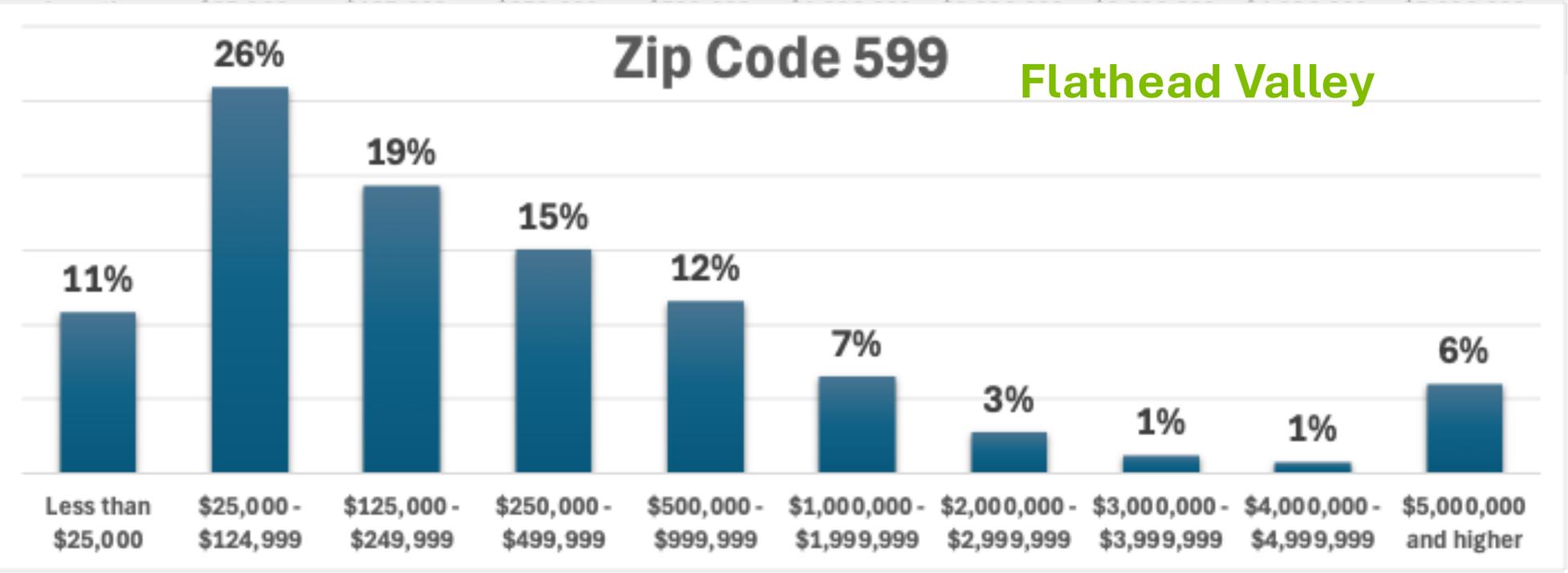
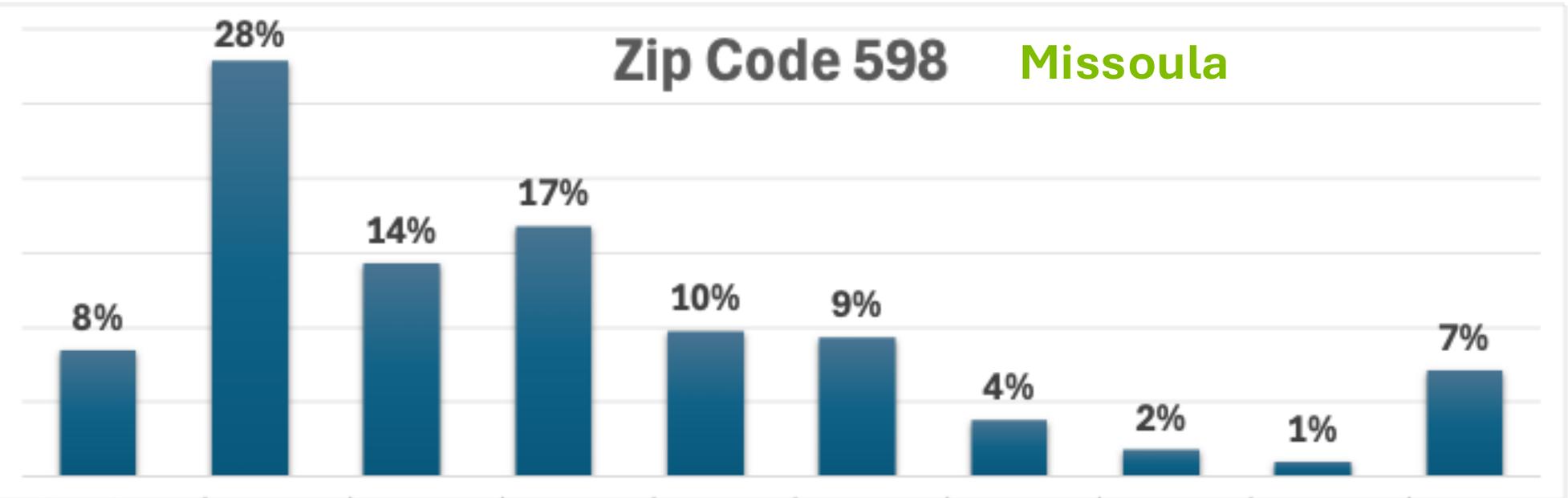
Source: IRS Exempt Organization Master List, 2026



Source: IRS Exempt Organization Master List, 2026



Source: IRS Exempt Organization Master List, 2026



Source: IRS Exempt Organization Master List, 2026



Montana Nonprofits – The #s

Compared to 2023:

- **More organizations are reporting lower reserves (0-3 months)**
- **More organizations are reporting more than 1 year of reserves**



Source: MNA Member Surveys, 2023 and 2025



MNA Resources and Support

- **Foundation Directory:** Finding local and mission-specific matches.
- **Rural Ambassadors:** In 12 communities in 2026, providing local and regional support, networking, and connection to resources.
- **Member Calls:** Free and Frequent connection with peers across the state, and beyond.



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Federal Policy and Impacts





Key Messages to Share

- **Uncertainty and Chaos are the two most common terms expressed the past year.**
 - So much energy, effort, and resources have been spent navigating uncertainty and change
- **Nonprofits are actively redirecting resources to fill gaps left by cuts and reductions in the federal workforce.**
- **Health policy opportunities in 2026, with significant negative impacts starting in 2027.**



Federal Policy and Impacts

Documented over 100 media stories of federal funding cuts, freezes, policy changes impacting Montana nonprofits (so far)

2025 Timeline:

January – OMB Funding Freeze

Spring – DOGE cuts

June – Administration releases budget proposals

July – Passage of HR1, historic cuts to Medicaid, SNAP

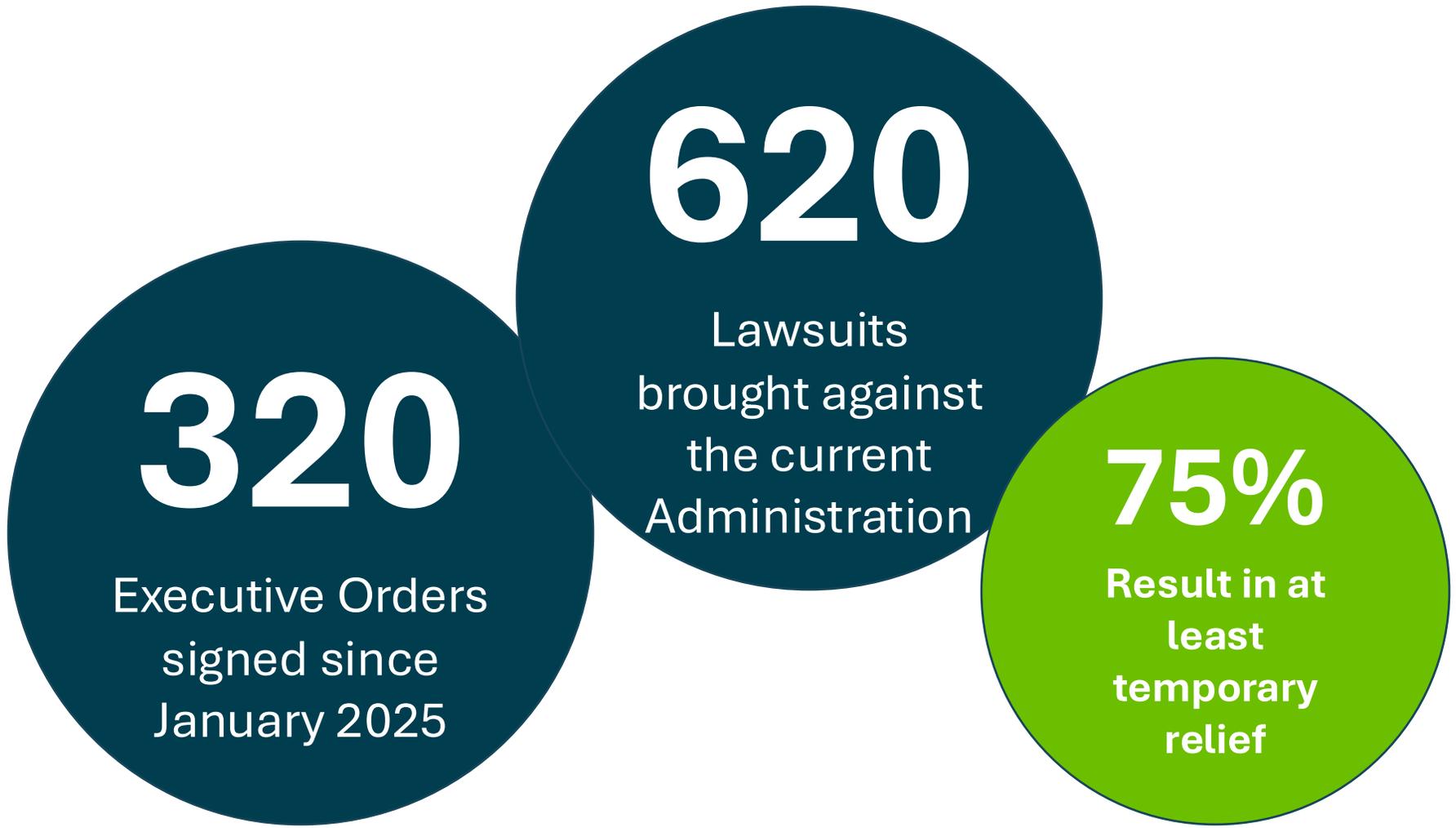
October – Longest government shutdown in history

November – Increased calls for investigations into nonprofits by mission area and community

December – ACA enhanced premium tax credits expire, Rural Health Transformation awards announced



Federal Policy and Impacts





Federal Policy and Impacts

317K

Fewer federal employees today than in January 2025

350

Investigations against specific or groups of nonprofits

1500

Fewer federal employees in MT, estimated.



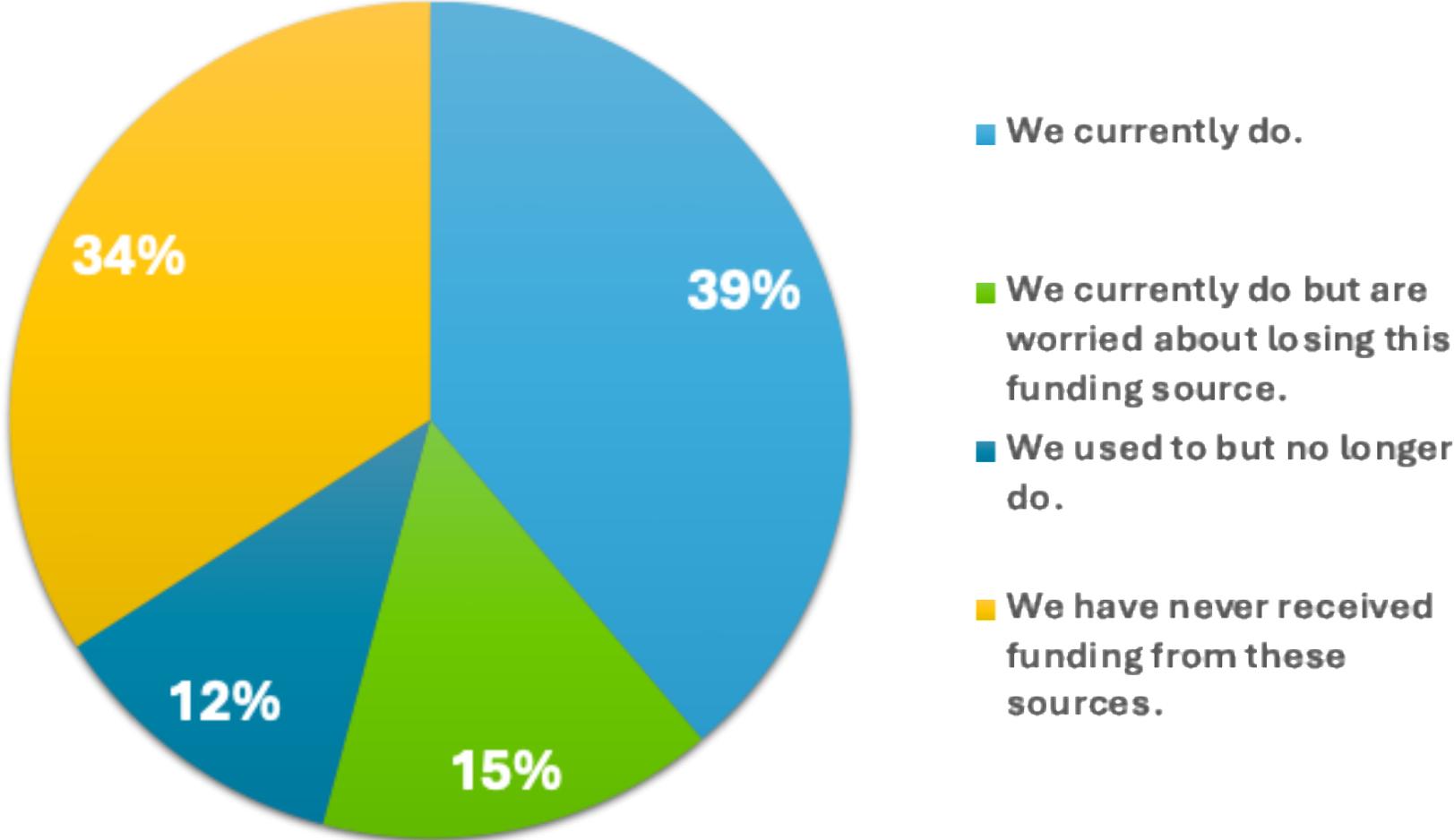
Federal Policy and Impacts

Federal Reserve Survey (119 Montana nonprofits):

- **78%** of nonprofits reported flat or declining revenue in the most recent quarter and **86%** expect flat or declining revenue over the next three months.
- **39%**, of all organizations identify federal grants/contracts as "**extremely important.**"
- **22%** have already experienced "significant decreases" in federal funding and **30%** expect significant decreases in the next three months.
- **62%** saw flat or decreased giving recently and **70%** expect this trend to continue.



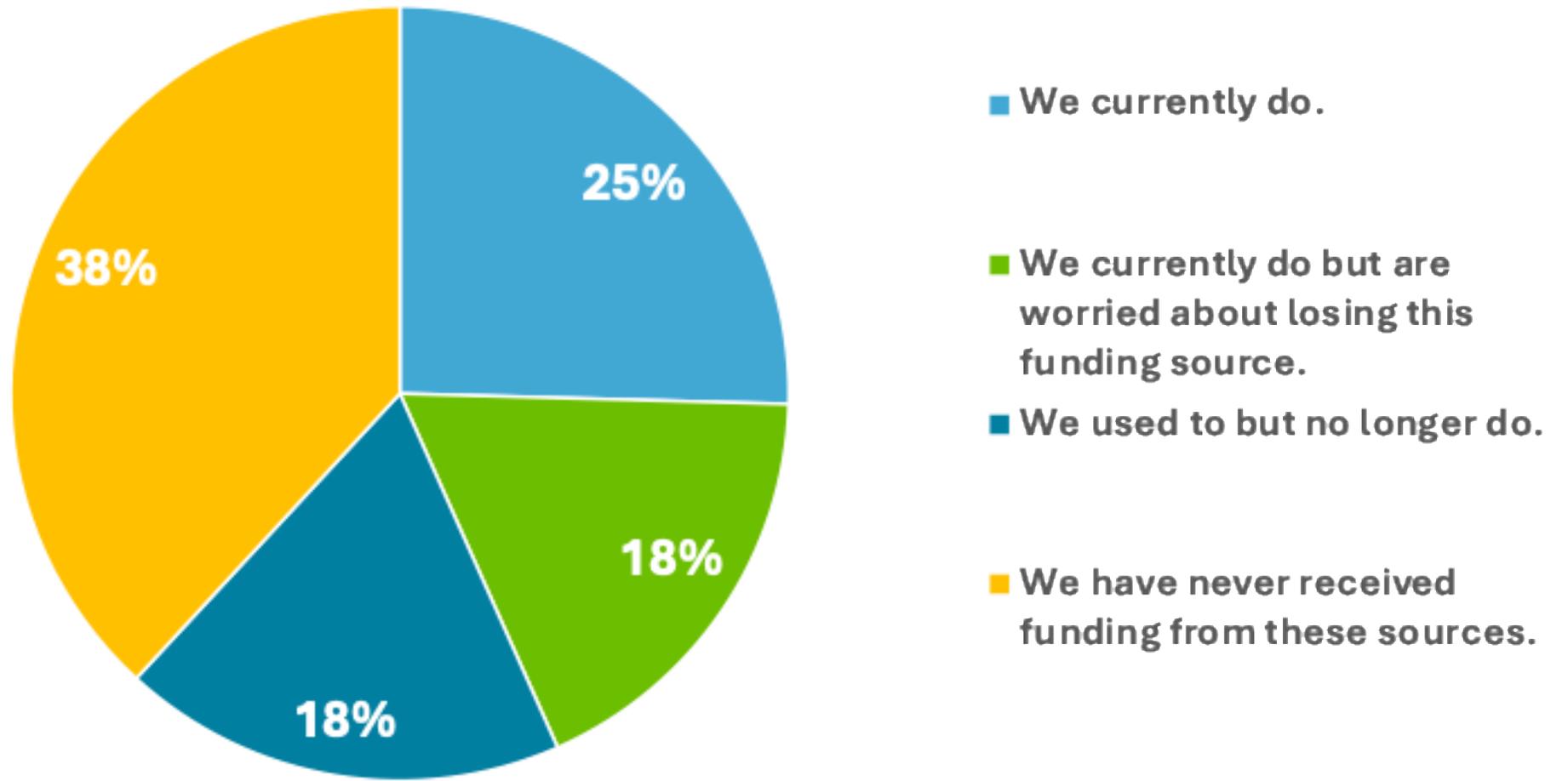
Do you receive State Grants/Contracts?



Source: MNA Member Surveys, 2023 and 2025

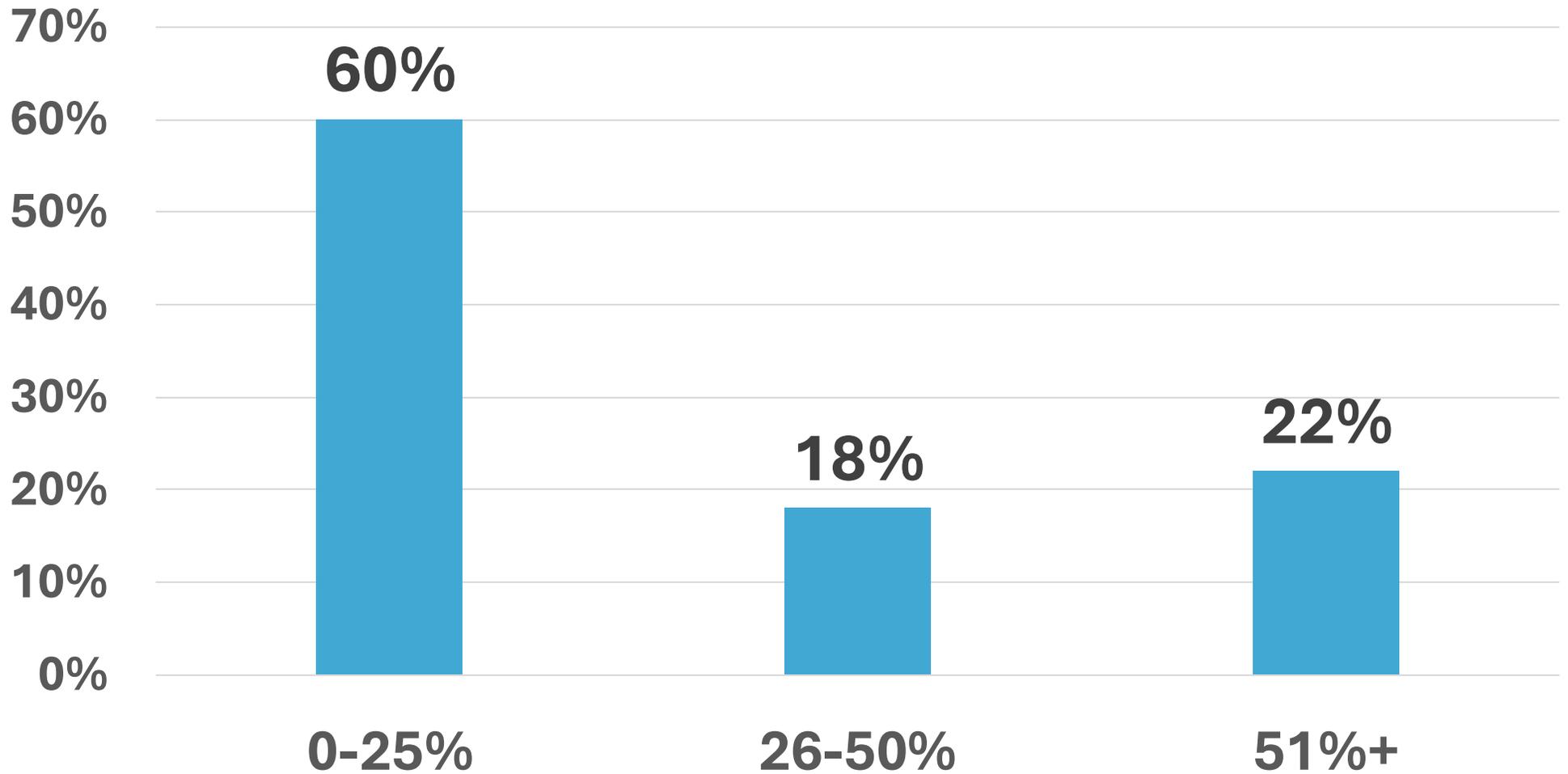


Do you receive Federal Grants/Contracts?





What percentage of your funding comes from state and/or federal sources?



Source: MNA Member Surveys, 2023 and 2025



Federal Policy and Impacts

The Real Cost of Cuts: How Federal Funding Cuts Impact Nonprofits

Direct federal funding to nonprofits, 2024



\$97.0B

Estimated change in direct federal funding, 2025



▼ \$20.9B



Federal Policy and Impacts

NATIONAL

24 hours of chaos as mental health grants are slashed then restored

JANUARY 15, 2026 · 9:39 AM ET

“NPR was unable to confirm who triggered the initial decision to terminate the grants by sending letters that abruptly signaled programs no longer “aligned” with the Trump administration's public health agenda.

After sending the letters, officials at the Department of Health and Human Services and SAMHSA went silent, offering no clarification to health care providers or the public about what would happen next or where patients should go for care.”

Sources: National Public Radio



Federal Policy and Impacts

Volunteers pick up Forest Service slack in wake of federal cuts

From snowplowing to trail clearing, local organizations take on growing share of public lands maintenance as feds cut back

Robert Chaney, Mountain Journal Jan 24, 2026 0

“Last year, many of the Forest Service employees who oversaw and teamed with the Absaroka-Beartooth Wilderness Foundation’s volunteers were laid off or resigned... By the foundation’s count, 42 of those were stationed on the Custer Gallatin, leaving just five full-time Forest Service employees to manage 3.2 million acres of backcountry.

Nevertheless, local groups are mobilizing this winter to get after backcountry tasks. Around Bozeman, Montana, the Friends of Hyalite has increased its annual snowplowing budget from \$10,000 to \$15,000 to keep the 17-mile Hyalite Canyon Road passable for ice climbers and backcountry skiers seeking the popular recreation area. The nonprofit is also moving \$10,000 it had budgeted for a backcountry steward job and redirected it to equipment and maintenance expenses.”



Health Care Impacts of HR-1

- HR-1 makes **deep, permanent cuts to Montana Medicaid**, a health benefits program that provides insurance to more than 200,000 eligible children and adults with low income
- Cuts are not automatic but are assumed through tightening eligibility standards and authorization requirements to join and stay in the program.
- As a nod to rural states' concerns about lost Medicaid Revenue, HR-1 included a large one-time fund for a Rural Healthcare Transformation Program. RHTP funding unlike Medicaid, is temporary (5 years), and is aimed **planning, restructuring, and pilot projects**, not replacing lost operating revenue

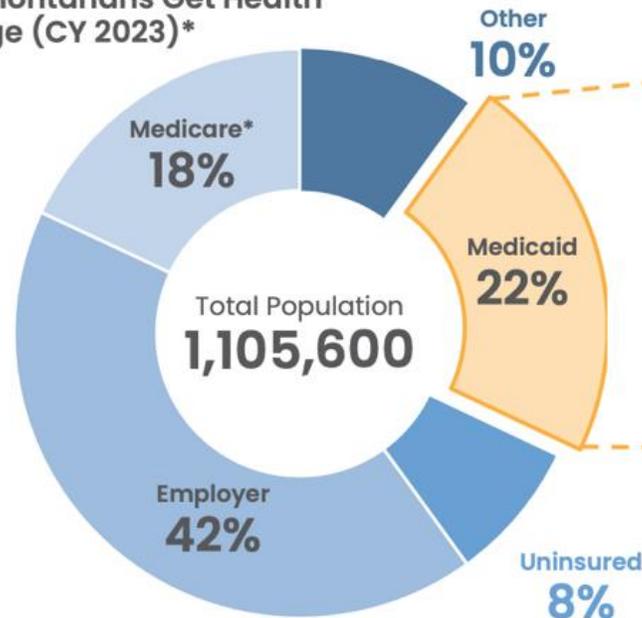


Health Care Impacts of HR 1

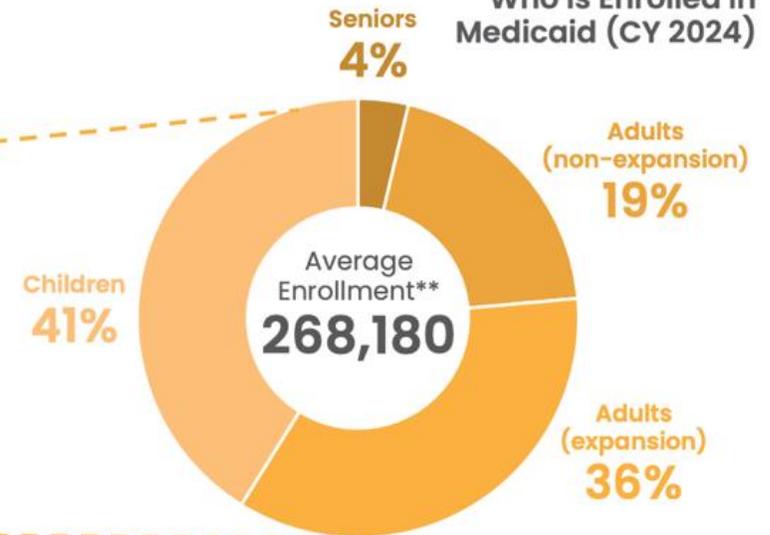
Medicaid is a critical resource, providing health insurance to 22% of Montanans.

Approximately one of every five Montanans (22%) was enrolled in Medicaid in 2023, including two of every five children and youth ages 0-18 (40%). Enrollment in Montana is similar to national rates: about 21% of Americans, including 39% of children and youth, are enrolled in Medicaid. In 2024, 35% of Medicaid enrollees were enrolled through Medicaid expansion (95,471 people).

Where Montanans Get Health Coverage (CY 2023)*



Who is Enrolled in Medicaid (CY 2024)



*The count of individuals with Medicare excludes those who report having both Medicare and Medicaid coverage, also known as "dual-eligibles." "Other" includes those covered under the military or Veterans Administration and individuals and families who purchased or are covered as a dependent by non-group insurance.

**Average monthly enrollment from Jan-Jun 2024. Totals include individuals enrolled in traditional Medicaid, Medicaid expansion, CHIP, and Healthy Kids Expansion.





Health Care Impacts of HR 1

- Estimated that Montana will see **23,000 – 38,000** Medicaid enrollees lose coverage as a result of HR-1, costing Montana Medicaid providers approximately **\$500million/year**.



Health Care Impacts of HR 1

Enter RHTP:

- \$50 Billion allocated and approved over 5 years:
 - 50% awarded equally
 - 50% competitive
- For 2026, Montana was awarded **\$233 million**, the fourth largest award in the country
- 2026 funds must be spent this year and next year's allocation is based on progress achieved this year



Health Care Impacts of HR 1

Montana's 2026 RHTP Budget

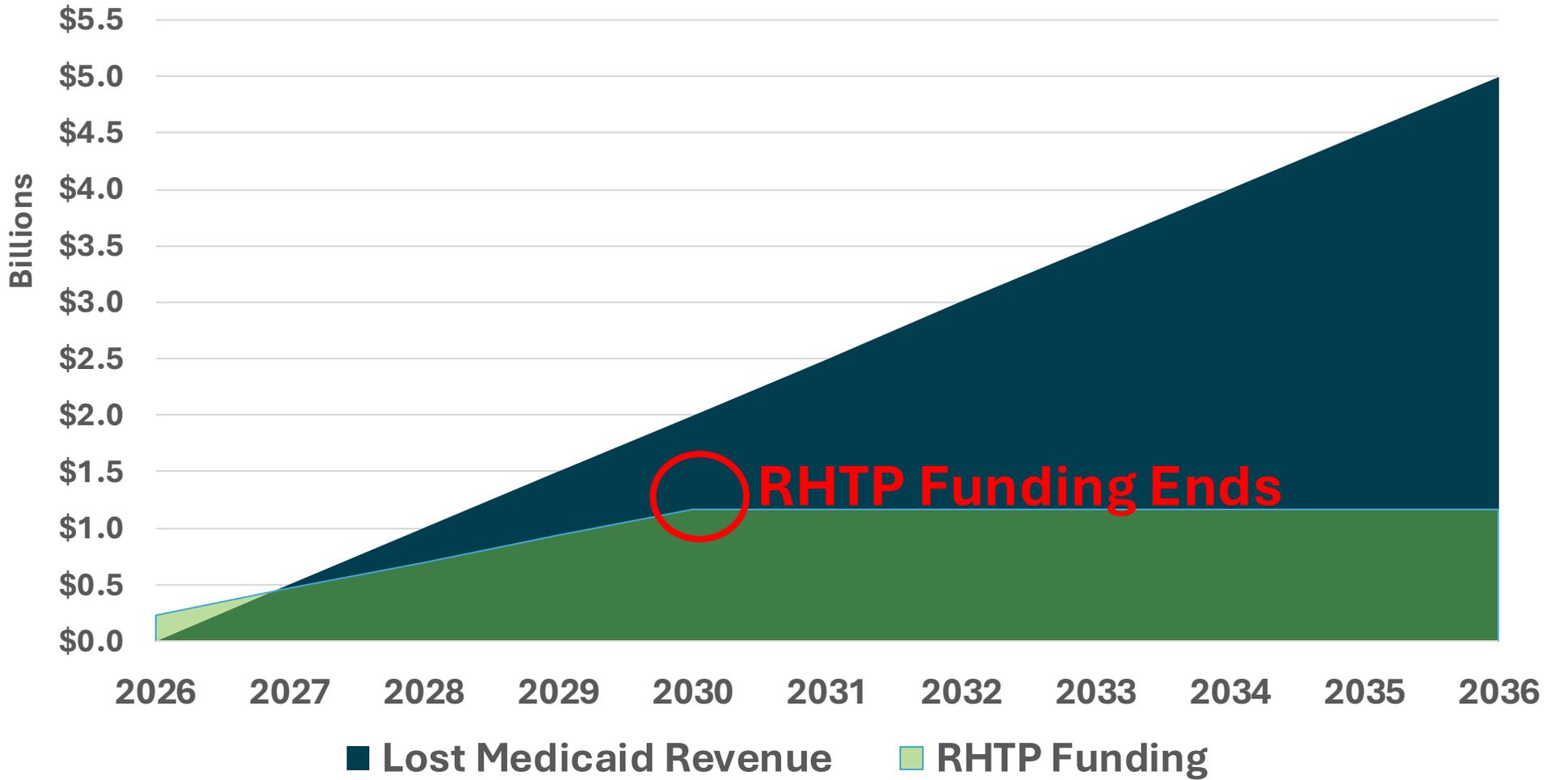


ruralhealth.mt.gov



Health Care Impacts of HR 1

Cumulative Lost Medicaid Revenue v. RHT Program Funding





MNA Resources and Support

- **Federal Funding Workgroup:** Coordinated awareness and advocacy.
- **Active in Interim Committees and Advisory Committees:** Participating in an interim study regarding federal funding and monitoring RHTP rollout and advisory committee meetings.
- **Connection to Congressionals:** So glad to have representation here with us today!



Charitable Giving





Key Messages to Share

- **Giving was up slightly through Q3**
 - Led by large gifts from existing donors
- **Continued trend of fewer donors but larger dollars**
- **Large decrease in small-dollar donors**
- **Non-human service subsectors holding their own, so far**



(Through Q3 – 2025)



DONORS

-3.0%

(+/- 3.5%)

YOY change



DOLLARS

+3.7%

(+/- 3.0%)

YOY change



RETENTION

+0.15

(+/- 0.15 p.p.)

YOY change



MICRO

(\$1 - \$100)

-10.3%

YOY Change

50.9%

% of total donors



MICRO

(\$1 - \$100)

-10.1%

YOY Change

1.6%

% of total dollars



SMALL

(\$101 - \$500)

-4.8%

YOY Change

30.8%

% of total donors



SMALL

(\$101 - \$500)

-5.1%

YOY Change

5.0%

% of total dollars



MIDSIZE

(\$501 - \$5K)

-3.9%

YOY Change

15.4%

% of total donors



MIDSIZE

(\$501 - \$5K)

-3.5%

YOY Change

16.0%

% of total dollars



MAJOR

(\$5K - \$50K)

-1.9%

YOY Change

2.6%

% of total donors



MAJOR

(\$5K - \$50K)

-1.6%

YOY Change

25.2%

% of total dollars



SUPERSIZE

(\$50K+)

-1.4%

YOY Change

0.4%

% of total donors



SUPERSIZE

(\$50K+)

-2.7%

YOY Change

52.3%

% of total dollars

Sources: Fundraising Effectiveness Project



MICRO

(\$1 - \$100)

-10.3%

YOY Change

50.9%

% of total donors



SMALL

(\$101 - \$500)

-4.8%

YOY Change

30.8%

% of total donors



MIDSIZE

(\$501 - \$5K)

-3.9%

YOY Change

15.4%

% of total donors



MAJOR

(\$5K - \$50K)

-1.9%

YOY Change

2.6%

% of total donors



SUPERSIZE

(\$50K+)

-1.4%

YOY Change

0.4%

% of total donors



MICRO

(\$1 - \$100)

-10.1%

YOY Change

1.6%

% of total dollars



SMALL

(\$101 - \$500)

-5.1%

YOY Change

5.0%

% of total dollars



MIDSIZE

(\$501 - \$5K)

-3.5%

YOY Change

16.0%

% of total dollars



MAJOR

(\$5K - \$50K)

-1.6%

YOY Change

25.2%

% of total dollars



SUPERSIZE

(\$50K+)

-2.7%

YOY Change

52.3%

% of total dollars



NEW DONORS

-10.2%
YOY Change

38.2%
% of total donors



NEW DONORS

-4.6%
YOY Change

18.4%
% of total dollars



NEW RETAINED DONORS

-9.6%
YOY Change

8.8%
% of total donors



NEW RETAINED DONORS

-7.8%
YOY Change

7.8%
% of total dollars



REPEAT RETAINED DONORS

-4.3%
YOY Change

39.9%
% of total donors



REPEAT RETAINED DONORS

-0.8%
YOY Change

61.6%
% of total dollars



RECAPTURED DONORS

-7.3%
YOY Change

13.1%
% of total donors



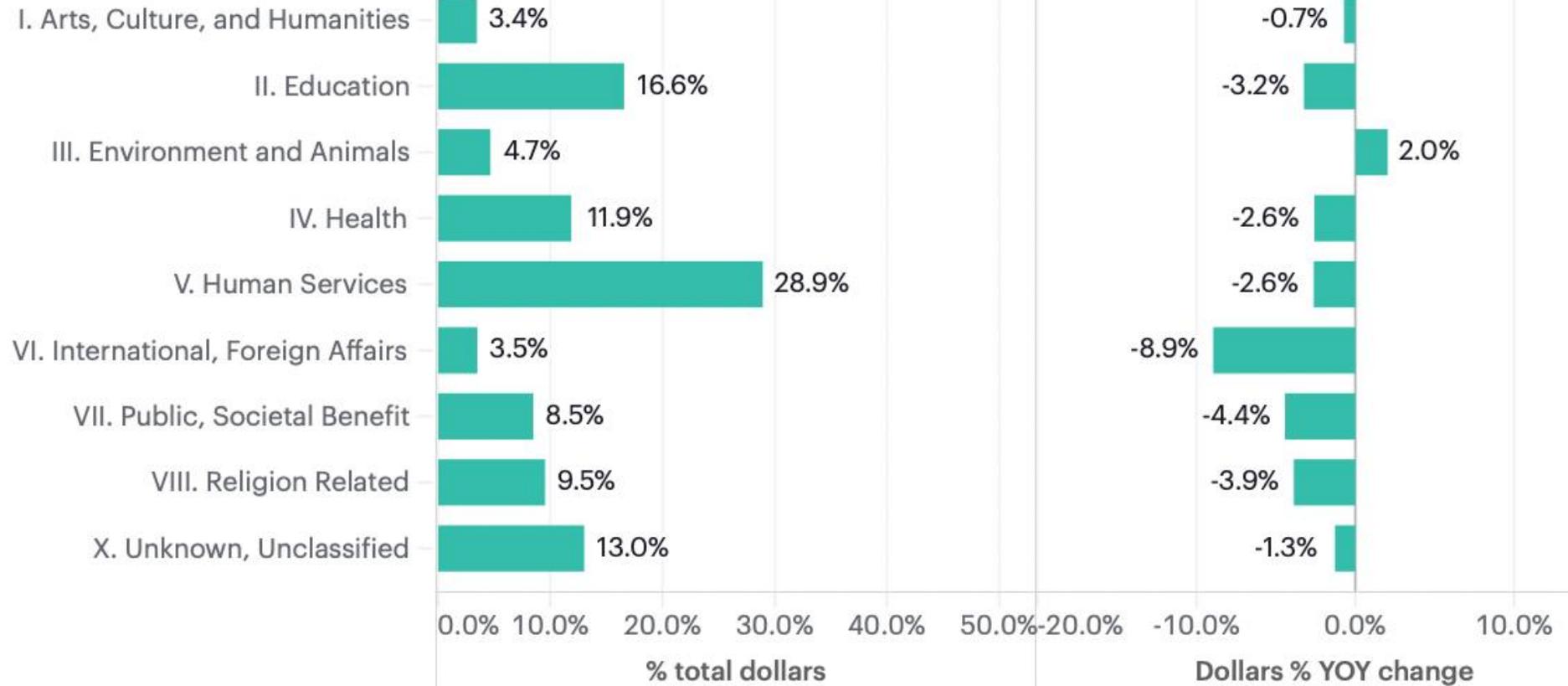
RECAPTURED DONORS

-6.3%
YOY Change

12.2%
% of total dollars

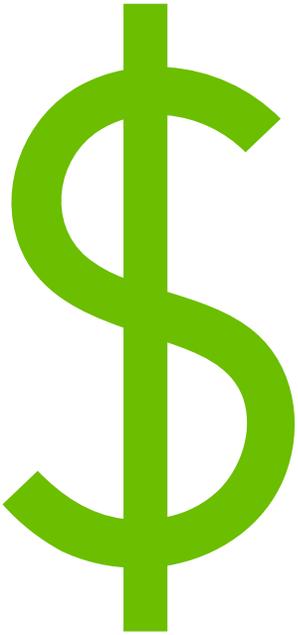


Organization cause

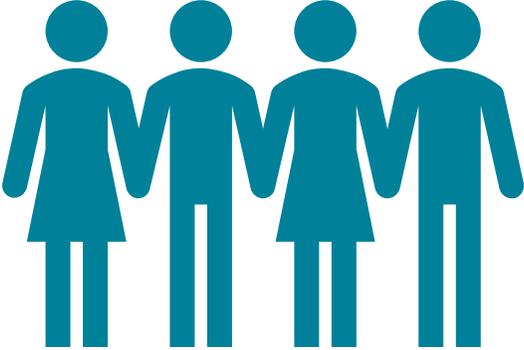




Montana Giving Days (May-September)



-7% to +21%



**Slightly DOWN
to Slightly UP**



MNA Resources and Support

- **MNA Fundraising Hub:**
 - Direct development services
 - Statewide training, resources, and tools
 - Technical Assistance for members
- **Fundraising Summit:** April 9 in Great Falls
- **Partners for Good Directory:** Experts ready and able to support fundraising work in a variety of areas.



State Conditions and Policy





Key Messages to Share

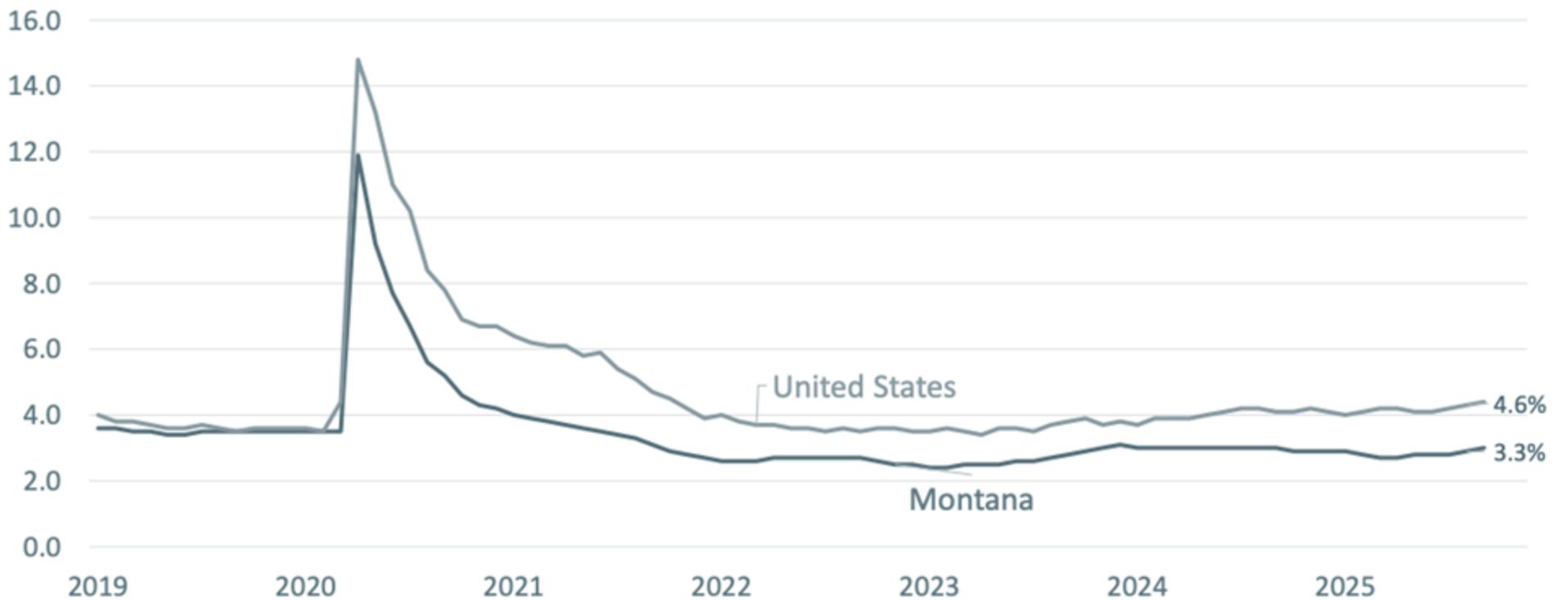
- **Montana is slowing and stabilizing in many ways:**
 - Jobs holding steady
 - Wage growth tops in country
 - Population trends: In-Migration slowing and natural change flat
 - Housing Affordability showing slow progress
- **2025 Legislative Session was a mixed bag**
- **2027 state revenue challenges looming**



Montana Economic Conditions

Unemployment Rate (%)

through November 2025

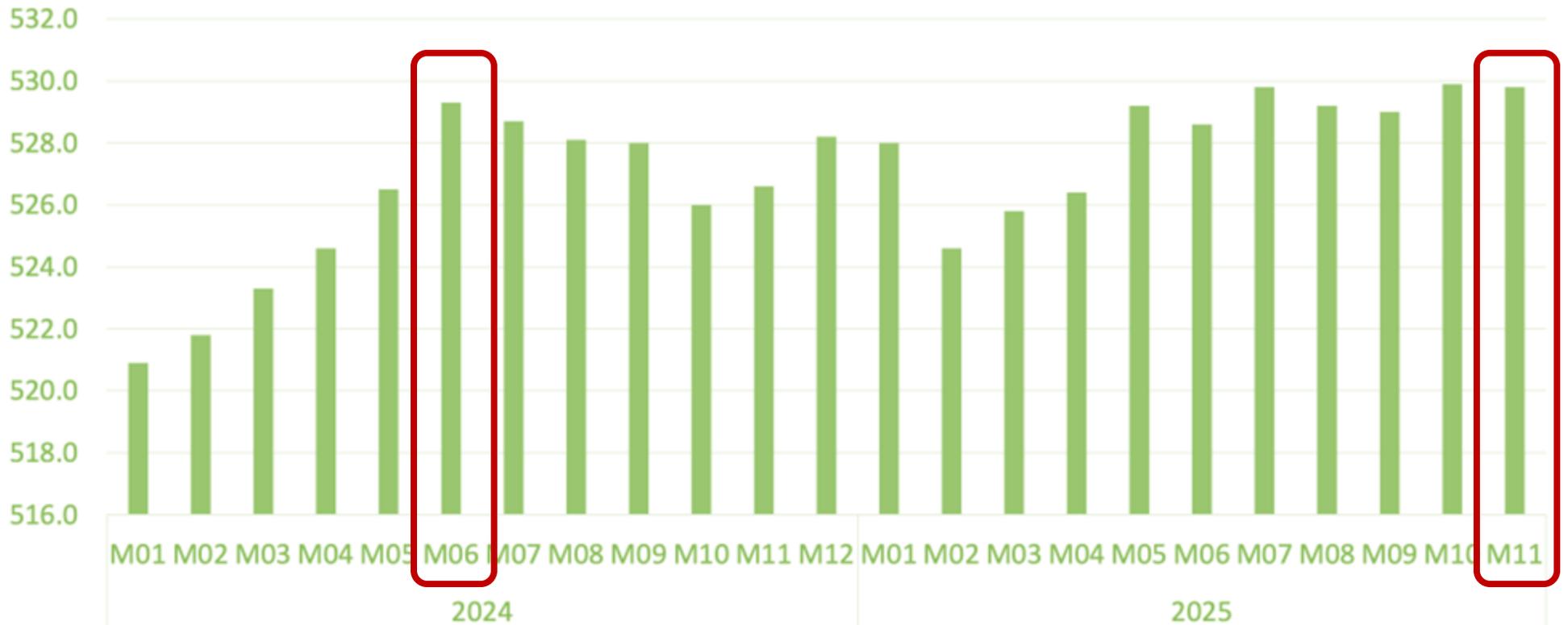




Montana Economic Conditions

Montana Jobs: Little Change Since mid-2024

(Source: Bureau of Labor Statistics/Montana DLI, CES Survey)

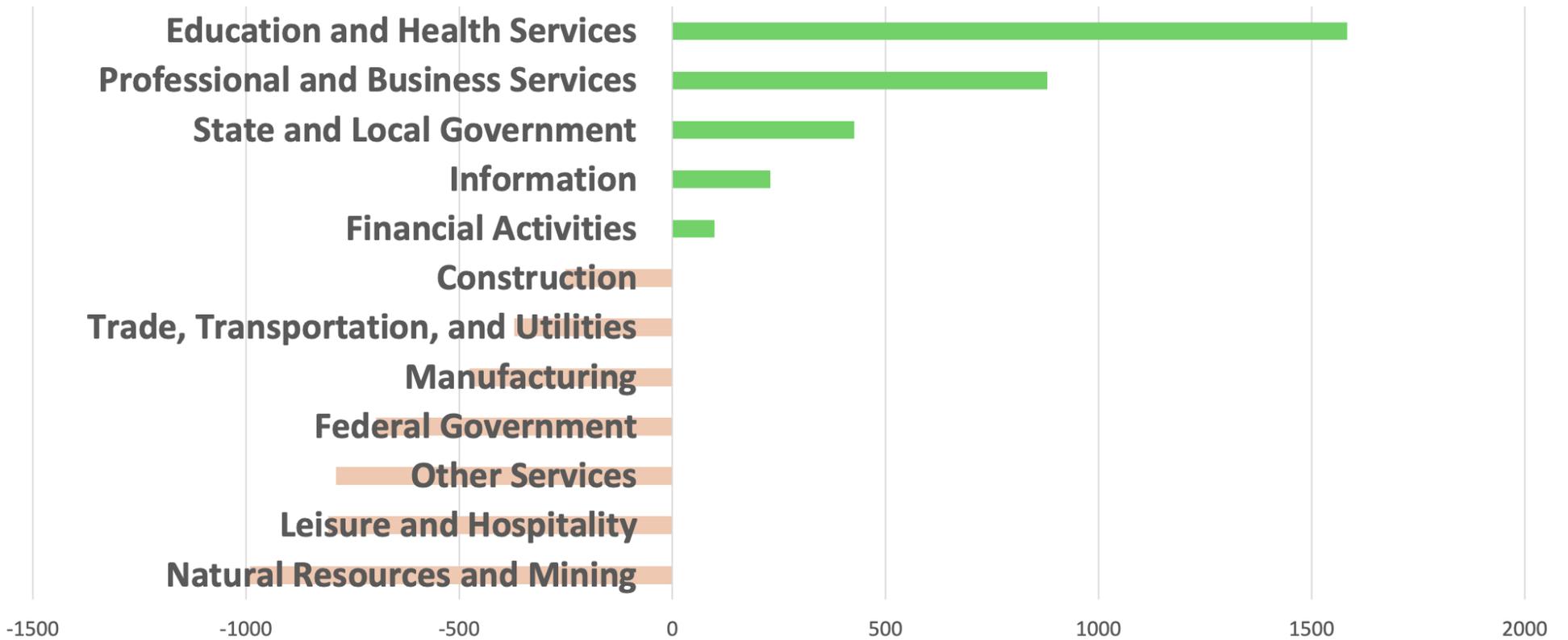




Montana Economic Conditions

Montana Job Growth By Major Industry

June 2024 – June 2025 (BLS QCEW)



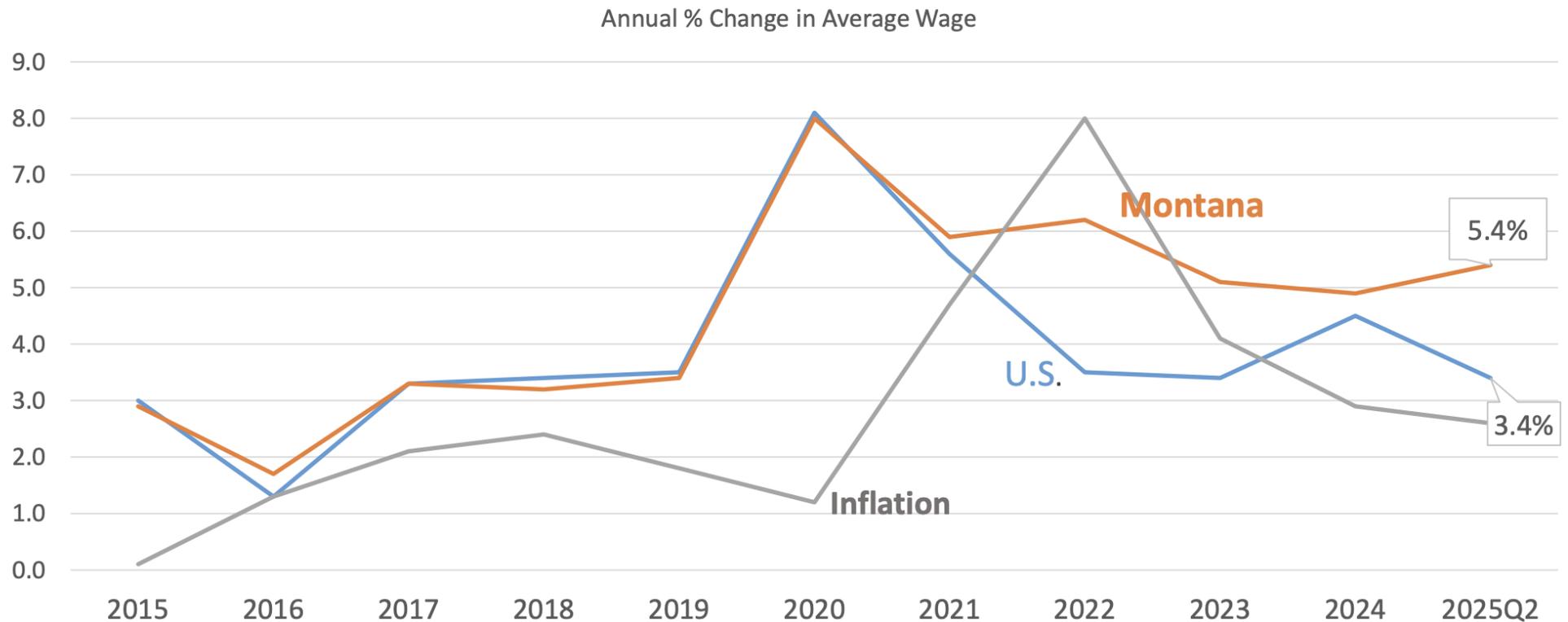


Montana Economic Conditions

Montana is top state for wage growth in 2025.

Beat U.S. Average For Past 4 Years.

State ranking moved from 46th to 41st since 2021.





Montana Economic Conditions

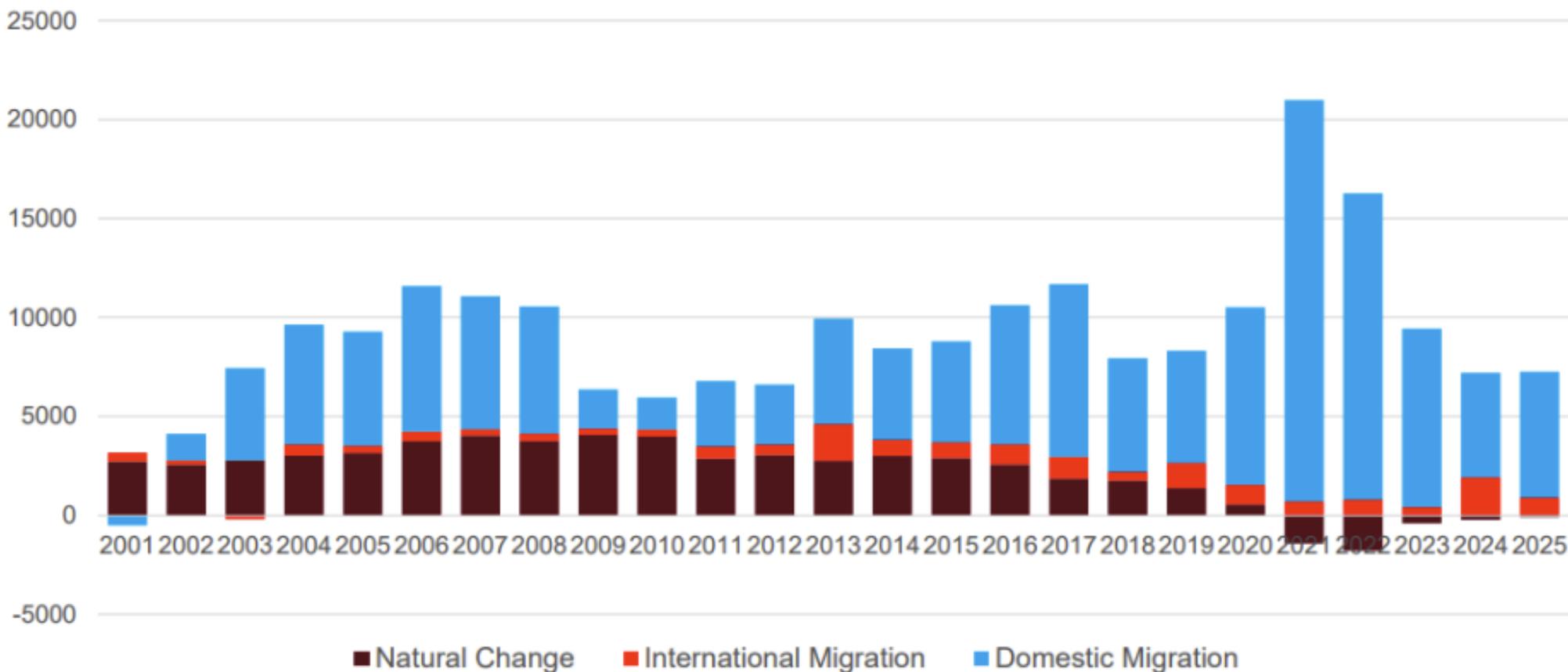
Real Personal Income, 2025Q3.
(2.7% growth over 12 months)

Fastest Growing Industries	\$ Millions	%
Health care and social assistance	\$301	4.5%
Information	\$241	28.0%
Professional, Scientific, and Technical Services	\$190	4.4%



Montana Economic Conditions

Montana Population Change by Components

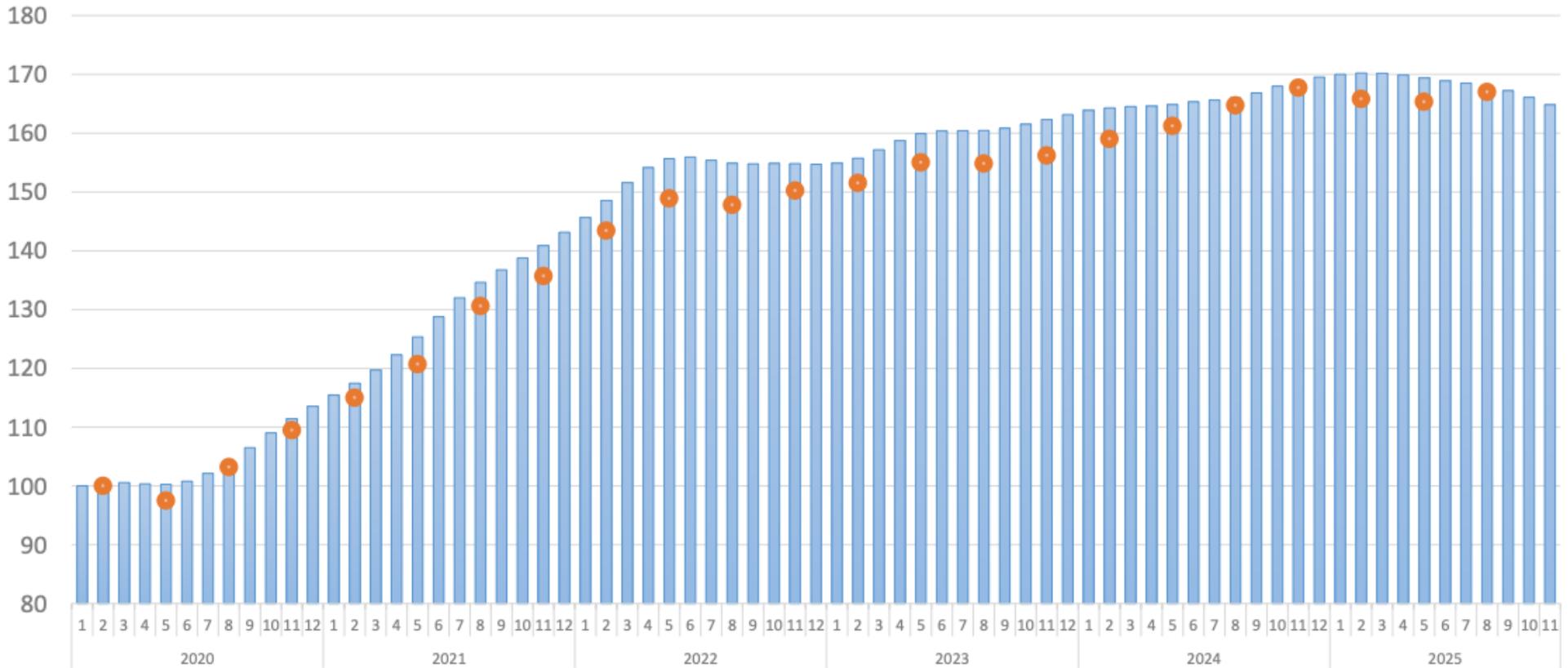


Sources: Montana Bureau of Business and Economic Research



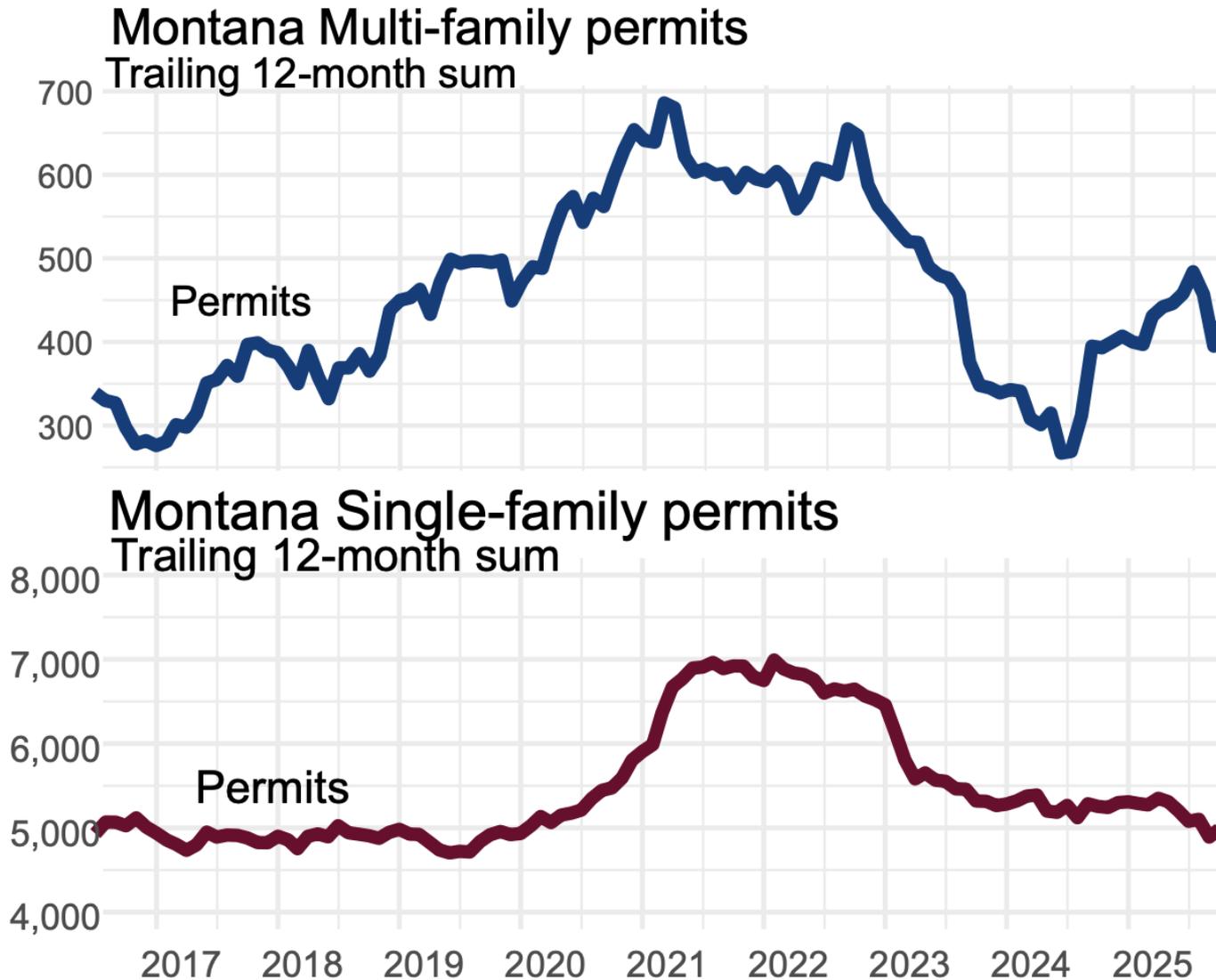
Montana Economic Conditions

FreddieMac Home Price Index (Bars): Peak Feb 2025. -3.2% from peak
FHFA Home Price Index (Dots): Peak Nov 2024. -0.4% from peak





Montana Economic Conditions



Sources: Montana Bureau of Business and Economic Research



Montana Economic Conditions

Housing Affordability SLOWLY Correcting:

- Flattening Home Prices
- Increasing Wage Growth
- Slightly Reducing Interest Rates
- Increasing Housing Stock, especially multi-family
- Reducing Property Tax Rates
- Slowing In-Migration

In 2025, Montana was still the #1 Least Affordable State by the National Association of Realtors



Montana Legislative Update

MNA advocated on more than 40 bills impacting the nonprofit sector and monitored another 25.

- Passed bill allowing nonprofits to accept credit cards in the sale of raffle tickets
- Helped defeat numerous harmful bills that would have restricted the work of nonprofits or their tax status
- Worked in coalition to support access to affordable housing, childcare, and healthcare – critical issues for our workforce and communities in our state.



Montana Legislative Update

MNA Policy Agenda



MNA Legislative Recap





Montana Legislative Update

- **Reauthorization of Expanded Medicaid**
- **Property Tax Restructuring**
- **Income Tax Reduction**
- **Establishment of the Growth and Opportunity (GO) Trust**
 - **Infrastructure**
 - **Housing**
 - **Child Care**
 - **Pensions**
 - **Tax Relief**



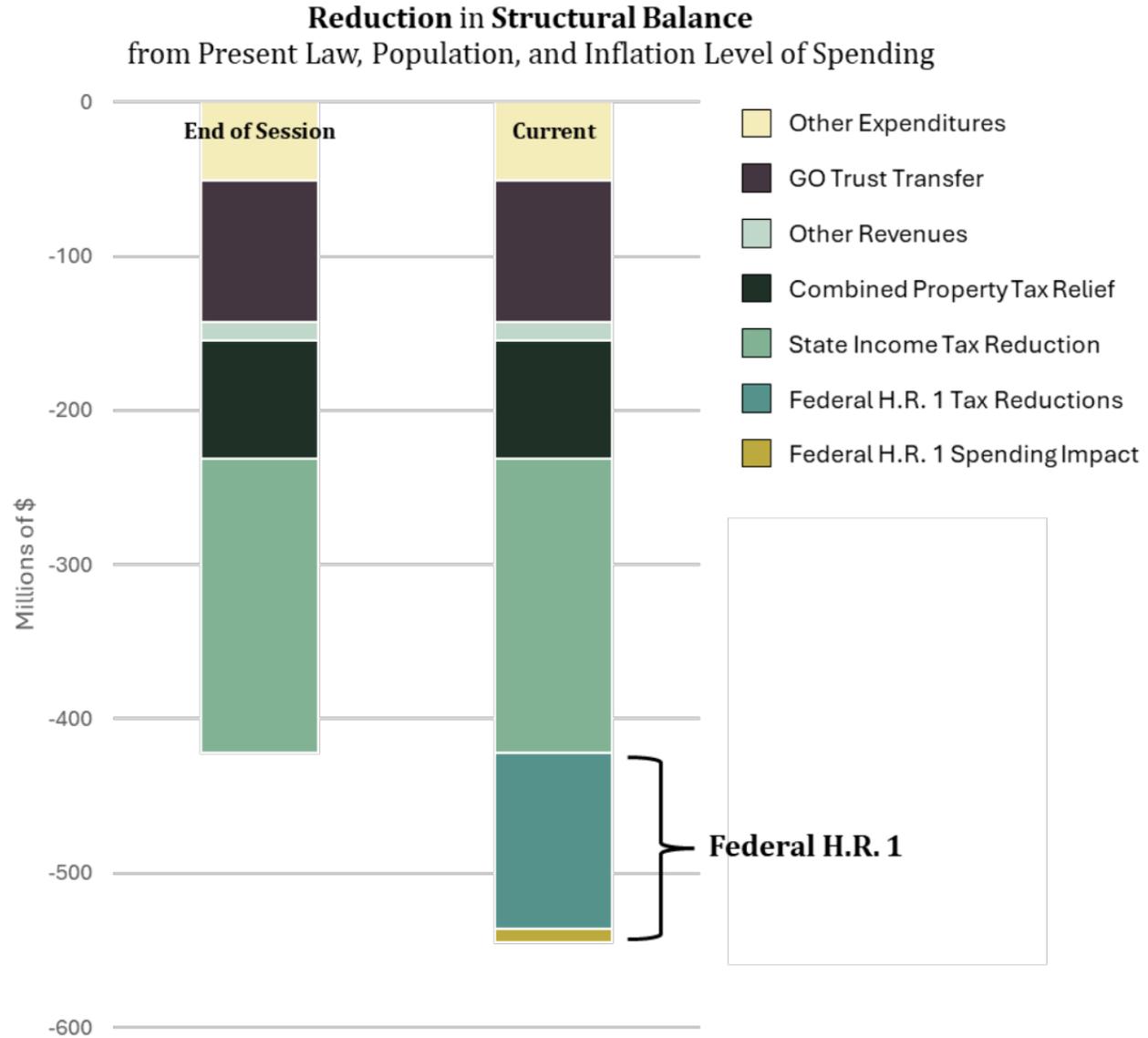
Montana Legislative Update

Looking at tighter fiscal conditions moving into 2027

- Tax rate reductions lowering state revenue
- GO Trust transfers taking from general fund dollars
- Impact of Federal HR 1 tax cuts

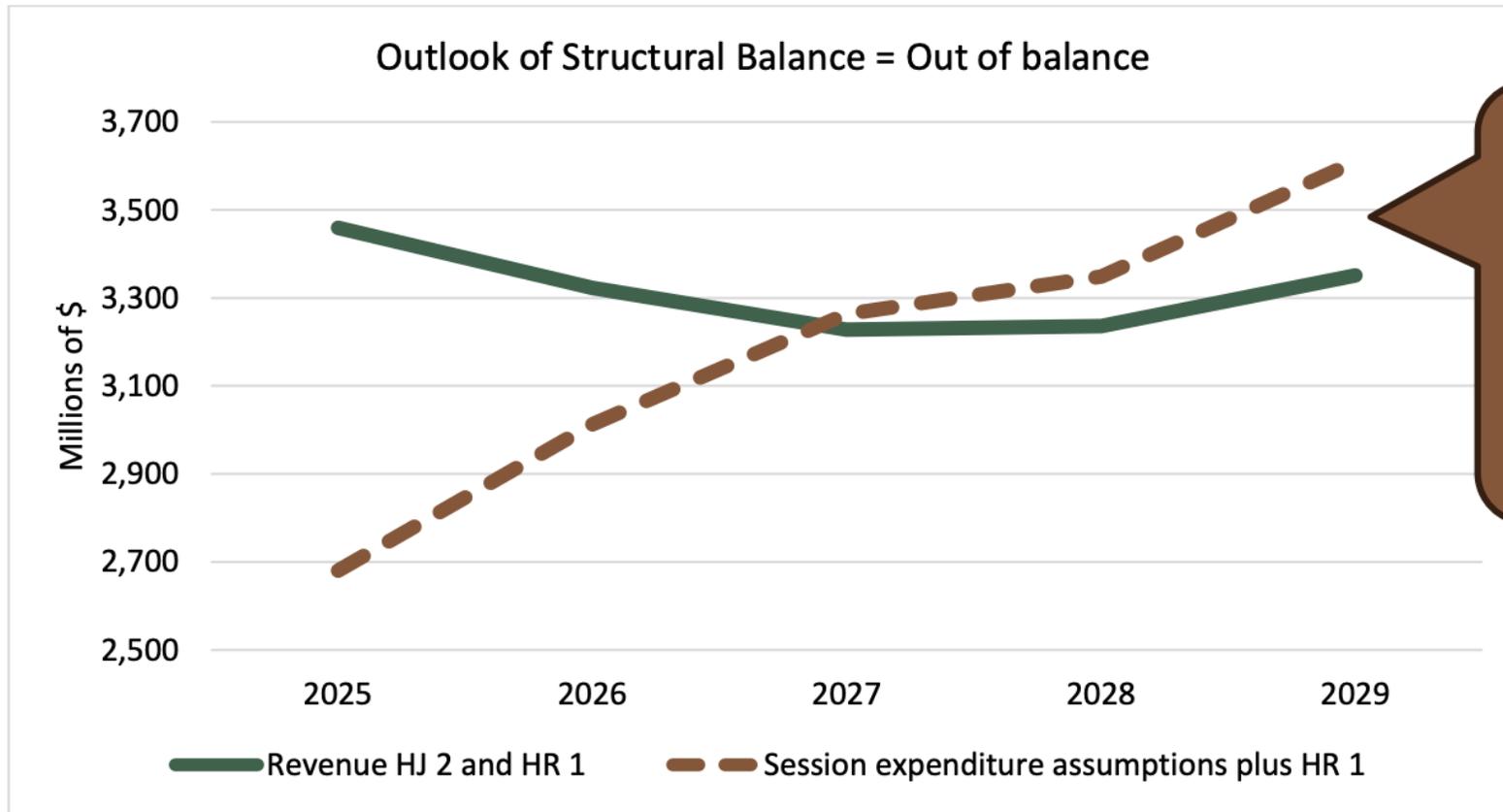


Montana Legislative Update





Montana Legislative Update





MNA Resources and Support

- **MNA Wage and Benefit Report:** Current data on market rates by position, size, subsector, and location.
- **MNA Policy Agenda and Policy Council:** Diverse group of leaders focused on the most pressing and important issues moving into 2027.
- **Access to Policymakers:** More intentionality in providing local orgs with access to policymakers.



What we want you to know today:

The only constant is change, but your mission has never been more important

Lead with curiosity, consistency, and community

Your VOICE Matters



What we want you to know today:

Whatever you are doing to make Montana better, keep doing it.

We need you.

This state needs you.

It matters. It all matters.



What we want you to know today:



MNA is here for and with you through it all!



Short Break, then Discussion:



Powered By QuestionPro

Please provide your feedback on today's presentation!



Agenda:

1. Open Question and Answer about NxN Content (20 minutes)
2. Group/Table conversations using questions in program (20 minutes)
3. Final large group questions and close (10 minutes)



Discussion Questions:



What part of the presentation resonated with you the most?

What surprised you?



What is your greatest concern for your organization, or your community, in the coming year?

What is your community's greatest opportunity in 2026?



What strategic planning do you hope to do with your board this year?

What are your next steps after learning this information?



What insights do you have about your community that weren't addressed in the presentation?



Final Questions:

1. What is the biggest hurdle your organization is facing this year?
2. After this morning's presentation and conversations, what is your top priority this year for your organization?
3. What is a message you want to share with other nonprofit leaders and your peers in the state?



Final Questions:



<https://www.menti.com/alnv1t88mg76>



What we want you to know today:



MNA is here for and with you through it all!