

# GIVING TOGETHER CHANGES LIVES

2019 ANNUAL REPORT TO THE COMMUNITY





# 2019 ANNUAL REPORT



## OUR MISSION

Whitefish Community Foundation is dedicated to fostering philanthropy, building endowments, and helping donors and nonprofits benefit our community.

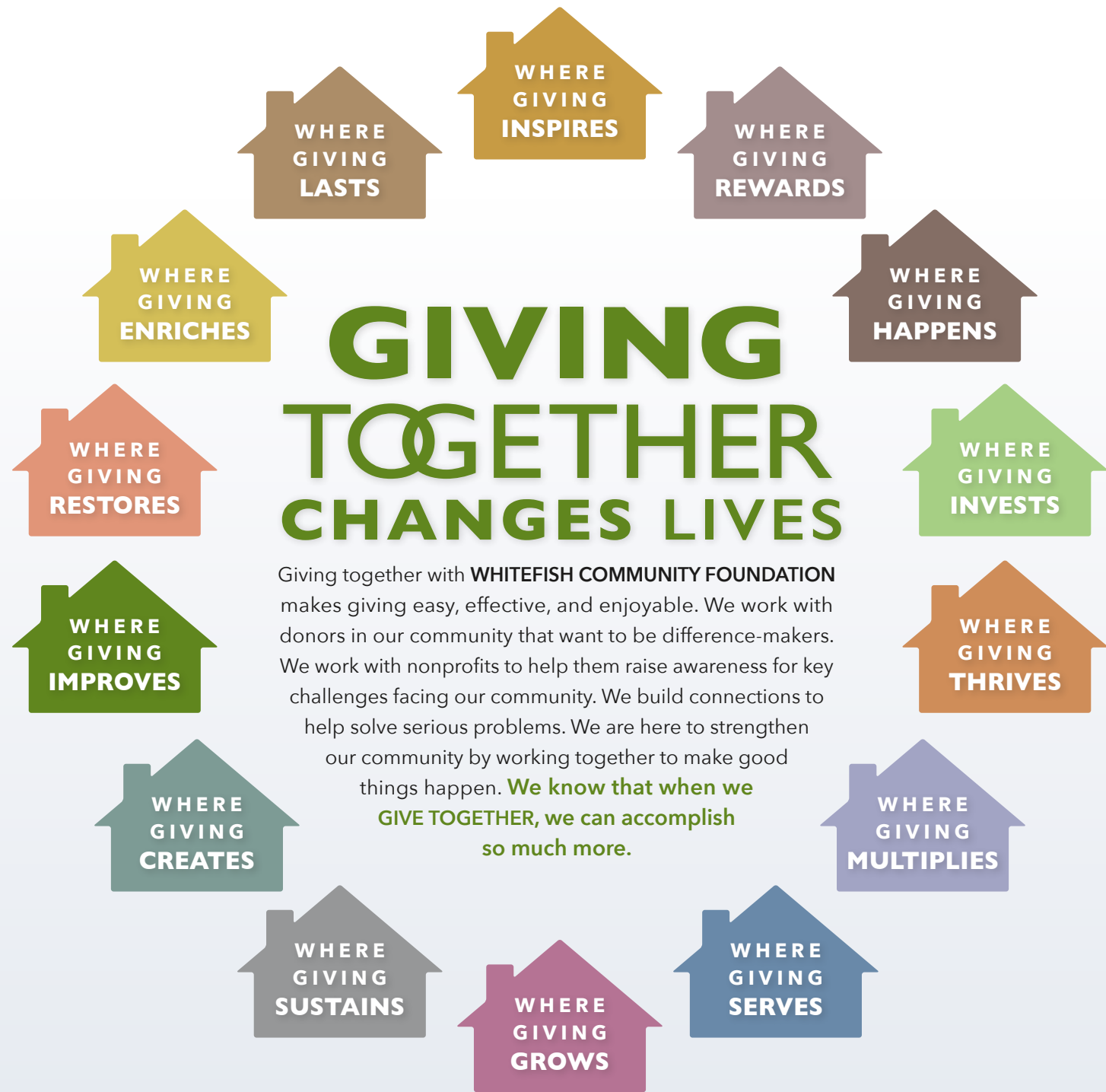
### OUR CHARTER:

- We provide effective ways for donors to make charitable contributions.
- We advise on strategic giving priorities.
- We invest gifts to grow and sustain giving.
- We offer services to simplify giving.
- We work with donors to empower giving.
- We lead initiatives to inspire giving.
- We strengthen local nonprofits to excel in governance.

Our end goal is to improve the quality of life in the greater Whitefish area, which includes supporting nonprofits that provide valuable resources to our community.

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# GIVING TOGETHER CHANGES LIVES

Giving together with **WHITEFISH COMMUNITY FOUNDATION** makes giving easy, effective, and enjoyable. We work with donors in our community that want to be difference-makers. We work with nonprofits to help them raise awareness for key challenges facing our community. We build connections to help solve serious problems. We are here to strengthen our community by working together to make good things happen. **We know that when we GIVE TOGETHER, we can accomplish so much more.**

## FROM THE BOARD CHAIR



**"YOU ARE THE INSPIRATION THAT KEEPS US FIRMLY GROUNDED IN OUR MISSION."**

Our Annual Report is indeed a reflection of the dedication and generous support of our donors. In 2019, many of you chose to join us on our journey of making real change in the lives of those we touch. As you read the heartwarming success stories in this year's report, please know how truly grateful all of us at the Whitefish Community Foundation are for your partnership and trust.

It is important to point out that our level of impact in the community is deeply connected to our Circle of Giving donors. Each year, we look to this mighty group of individual donors for the funding of the Great Fish platform, the Great Fish Match, Community Grants, Major Grants, and more. The Circle's financial support has strengthened our foundation and expanded our programs.

Because of the growth in the Circle donations this year, we were able to include 53 nonprofits in our Great Fish Community Challenge charitable campaign that raised an astounding \$2.8 million for critical programs and services in the greater Whitefish area. Thanks to our community's support, nonprofits in the challenge raised an average of \$43,000 for programs that benefit our community.

Last summer's 360 Event introduced our newest initiative, The Kids Fund—Giving Voice to Children. Our goal is to partner with nonprofits to develop sustainable programs that target children at risk or who are suffering in homeless situations, and create lasting life changes.

Strengthening the oversight of our nonprofit community continues to remain a high priority for the Foundation. With that in mind, our President Linda Engh-Grady and Community Foundation staff offered focused development workshops in 2019 for nonprofit directors, board members, and volunteers. We know that giving our nonprofit partners the training they need to succeed is a win/win for our community and creates sustainability for their essential programs and their stakeholders.

As we begin this new year, and the 20th anniversary of the Whitefish Community Foundation, my message to our donors, our nonprofits, and our community is simple: You are the inspiration that keeps us firmly grounded in our mission. By building lasting relationships, our hope is to continue to make good things happen and change lives for the better.

Linda Maetzold  
Board Chair  
2019-2021

## GROWING TO SERVE

<b>\$37M</b>	.....Combined Assets
<b>\$21M</b>	.....Donor Advised Funds
<b>\$11M</b>	.....Endowed Assets
<b>\$5.7M</b>	.....Total Grants Awarded in 2019
<b>1,077</b>	.....Grants Awarded in 2019
<b>214</b>	.....Nonprofits Received Funding



WHERE GIVING ENRICHES



Dave and Sherry Lesar

"We are committed to Whitefish and are proud to 'give back' to this very special community that has given us so much joy."

-Dave and Sherry Lesar

"Our family came to Whitefish over 20 years ago like many people do—as summer visitors. We were immediately struck by the beauty of the surroundings, the friendliness of the people, and charm of the city. Whitefish is very much like the small town in Wisconsin where Dave and I met, went to high school together, and were married. It is a place that feels comfortable and familiar to us—one that we wanted to share with our children. Our son and daughter-in-law have made the Valley their permanent home and they, in turn, will share it with their children. So in a very real way, choosing Whitefish completes a generational circle for our family. It is our "heart home," a place unlike any other for us. From that first visit, we were welcomed warmly into this community and it has given us a strong sense of belonging, lasting friendships, an ease of lifestyle, and the exhilarating renewal that being in nature creates. We are committed to Whitefish and are proud to 'give back' to this very special community that has given us so much joy. Whitefish is often referred to as 'The Last Best Place', but for us, it is simply the very best place."

Dave and Sherry Lesar have been deeply committed to making a positive and lasting impact on Whitefish and the state of Montana for nearly 20 years. Over the years, the Lesar Family Foundation has supported Stumptown Ice Den for the benefit of local youth, Shepherd's Hand in establishing an endowment and creating a much needed dental program, helped North Valley Hospital to build its current Planetree facility to serve the healthcare needs of the community, and contributed to the creation of the Center for Sustainability for greater educational opportunities for students. Recently, the Lesars have endowed the new Kids Fund at the Whitefish Community Foundation with a major matching gift. Dave and Sherry are proud members of the WCF Circle of Giving, which contributes to the many nonprofits participating in the Great Fish Community Challenge.



Brian Schott



*"The Whitefish Community Foundation inspired us to want to give back and get more involved to help Whitefish and the greater Flathead Valley community."*

*-Marlin and Maureen McKeever*



Gravity Shots

**WHERE  
GIVING  
REWARDS**



**Marlin and Maureen McKeever**

*"Upon discovering Whitefish in 2005, we knew it was a special place and we would be returning. In 2010 we did return to visit friends and truly fell in love with the town, the beauty, the easy-going lifestyle, and sense of community. The following year we purchased a home in Whitefish and knew it would not be long before we made the decision to make Whitefish our main residence. Soon after our move, our youngest daughter moved here to raise her family and we are fortunate that her older sister and family is following suit and planning a move to Whitefish in the near future.*

*We were introduced to the Whitefish Community Foundation and saw firsthand how they strive to support and enrich the people and nonprofits of the Flathead Valley. We were especially impressed with the Circle of Giving and the success of the Great Fish Community Challenge. We observed how the Great Fish Community Challenge helped bring the community together to give to our diverse groups of local nonprofits. The Whitefish Community Foundation inspired us to want to give back and get more involved to help Whitefish and the greater Flathead Valley community."*

Marlin and Maureen are WCF fund holders and Circle of Giving members. They are also active on the board of the DeliverFund which aims to put an end to human trafficking in the United States by using cutting edge technology to train and support law enforcement.

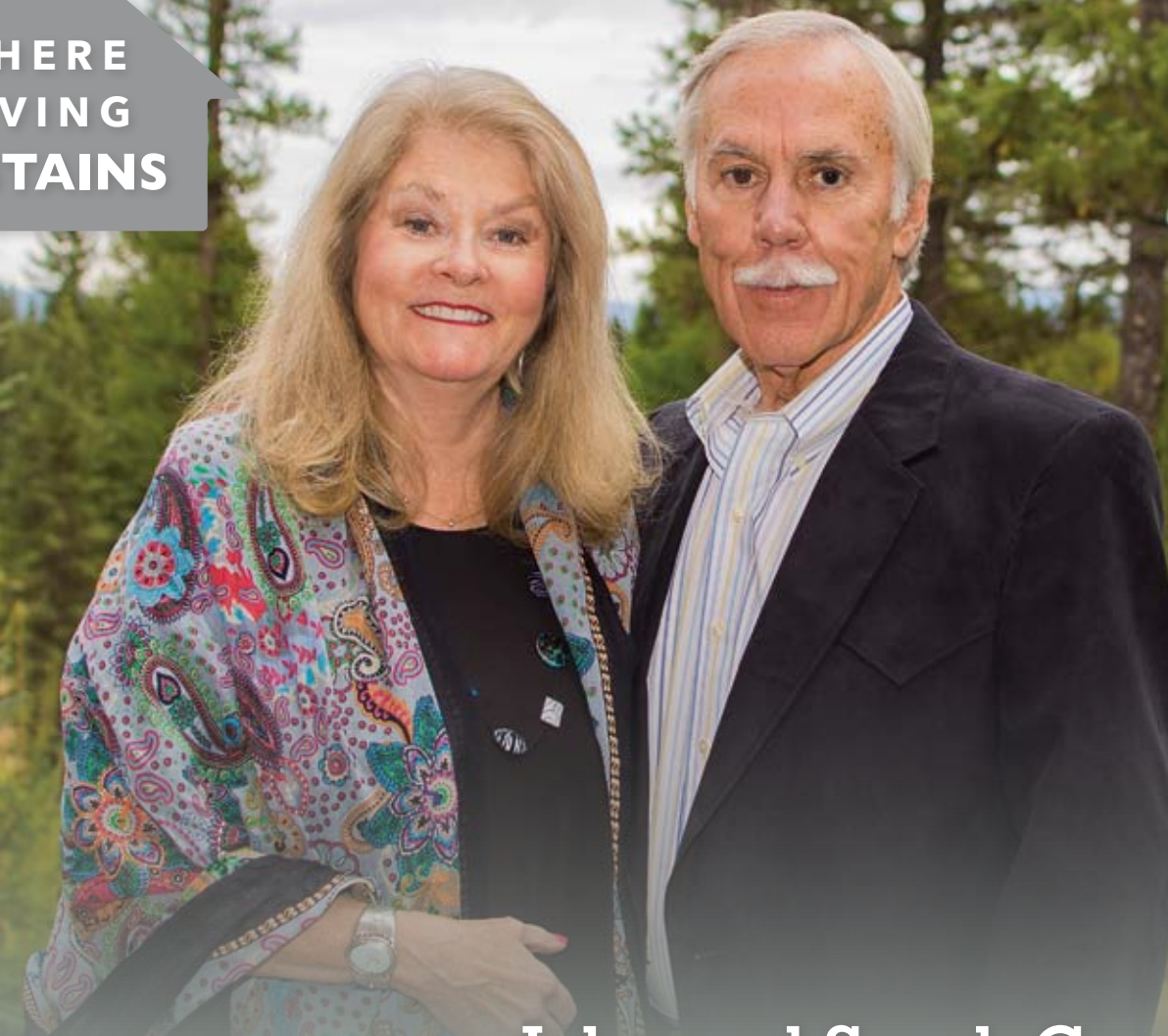
*"Although there is great abundance in the Valley, there is also great need. The \$857,000 WCF raised through the Circle of Giving in 2019 demonstrates community resolve to help with those needs. It is our pleasure to be in the Circle of Giving."*

*-John and Sarah Graves*



Gravity Shots

## WHERE GIVING SUSTAINS



**John and Sarah Graves**

*"Sarah was raised in Minnesota and then attended MSU. While in Bozeman she developed a strong appreciation of the many wonders of Montana. My only experience with the state was seeing a tiny part of Yellowstone as a teen. My fondest memory of that trip was the enjoyment I secretly had while encouraging my little brother to pet the bears. In August of 2009, Sarah and I visited friends in Kalispell in an attempt to escape the brutal eastern Oklahoma heat. Like all first-time visitors, we were awe-struck with the beauty and majesty that greeted us. With our friends' thoughtful help and guidance, we soon felt like the Valley could be a second home for us. I know; who doesn't?"*

*We found the perfect house for us a few miles south of Whitefish and have enjoyed being part-timers for 10 years. The best features of our Treasure State home are the friends we have made. We first met Linda and learned about the Whitefish Community Foundation at the Summer Arts Social at Iron Horse in 2011. The more we learned about WCF the more impressed we were. Tulsa has a highly ranked United Way, and the second largest community foundation in the country, but WCF has the creativity, community involvement, and intense focus to help both nonprofits and donors. Although there is great abundance in the Valley, there is also great need. The \$857,000 WCF raised through the Circle of Giving in 2019 demonstrates community resolve to help with those needs. It is our pleasure to be in the Circle of Giving."*

John and Sarah Graves are members of the Whitefish Community Foundation's Circle of Giving. John launched the Shining Honor Project in 2017. The Shining Honor Project employs adults with developmental challenges to clean and maintain veterans' headstones. Since 2017 they have cleaned over 5,000 headstones in Oklahoma and Montana.

WHERE  
GIVING  
INSPIRES



It is thanks to our generous donors that make up the Circle of Giving that the Community Grant Program and the Great Fish Community Challenge have grown to be such successful programs today, benefitting our local nonprofits.

Names in **bold** represent donors who have given at the Circle level for 5 years or more, demonstrating their long-term commitment to improving the quality of life in Whitefish.

## CIRCLE OF GIVING

**THE CIRCLE OF GIVING** is the Whitefish Community Foundation's core group of donors. It is comprised of generous donors who see the value of philanthropy and what it can do to change lives. Circle donors support the mission of the Foundation with an annual gift of \$5,000 or more, with some donors giving as much as \$50,000. The Circle allows our donors to pool their resources to create the maximum amount of impact multiplied over hundreds of worthy causes. The Circle is the backbone of the Great Fish Community Challenge and makes it possible to organize and provide a strong matching grant each year. 95% of gifts made to the Circle of Giving directly support the Foundation's grant programs and the Great Fish Community Challenge, while 5% of the gifts help to underwrite the operations of the Whitefish Community Foundation.

- |                                      |                                 |                                |
|--------------------------------------|---------------------------------|--------------------------------|
| Anonymous (2)                        | Shirley and John Griffith       | Mark Schmidt                   |
| <b>AGL Foundation</b>                | Jill and Christopher Gwaltney   | Marie and Mike Shaw            |
| <b>Teri and Jeff Allen</b>           | Jes and John Hagale             | <b>Janna and Jamie Shennan</b> |
| <b>Carol and Richard Atkinson</b>    | Mary Lloyd and Richard Harding  | <b>Carole and Roger Spragg</b> |
| Julie and Summerfield Baldrige       | Stephanie and Fred Harman       | Nancy and David Stokes         |
| Sharon and Dean Baltzell             | Marianne and Fred Hawkins       | Jill and James Stroud          |
| Charlene and Stephen Barasch         | Shannon and Brian Haycox        | Linda and Andrew Viens         |
| <b>Cindy and Mogens Bay</b>          | Patty and Bob Hayes             | <b>Lori and Robb Voyles</b>    |
| <b>Betsy and Bill Bayne</b>          | Kristin and Gregory Hetzer      | <b>Dori and Bill Walton</b>    |
| Dolores and James Beightol           | <b>Bill Howard</b>              | Katie and Benjamin Ward        |
| <b>Mary Ann and William Bindley</b>  | Cheryl and Brad Howard          | Leslie and Mike Warning        |
| <b>Sandy and Dick Boyce</b>          | Jodi and Steve Howard           | <b>Boots and Alan Warrick</b>  |
| Beth and Jerome Broussard            | <b>Ila B. Dousman Fund</b>      | Carol Bibler and Jim Watson    |
| <b>Rockwood Brown</b>                | <b>Iron Horse Foundation</b>    | <b>Byrdie and Ken Wessels</b>  |
| in memory of Marilyn Brown           | <b>Barbara and Mike Jenson</b>  | <b>Ardy and Steve Whisler</b>  |
| Dorothy and Luther Campbell          | <b>Ann and Paul Jeremiassen</b> | Judy and Dave Williams         |
| Eileen Bocci Campbell                | Maureen and John King           | Mary and Hal Williamson        |
| <b>Janice and James Case</b>         | <b>John Kramer</b>              | Bet and Doug Wise              |
| Karen and Nick Chickering            | <b>Mignon and Jay Latimer</b>   | <b>Susan and John Witt</b>     |
| Jane Kollmeyer and Terry Chute       | Gerry and Frank Leftwich        |                                |
| CK and Jim Coles                     | Sherry and Dave Lesar           |                                |
| <b>Anne and John Collins</b>         | Linda and Charles Maetzold      |                                |
| Linda Cornutt                        | Allison and Rick Magnuson       |                                |
| Candy and Eddie DeBartolo and Family | Janet Mayo                      |                                |
| <b>Debbie and Robert Douglas</b>     | Maureen and Marlin McKeever     |                                |
| Nora and Blake Dunlop                | <b>Lori Miller</b>              |                                |
| <b>Barbara and Mike Gallagher</b>    | Ellen and Matt Moran            |                                |
| Laura and James Garbacz              | Barbara Morris                  |                                |
| Kathy and Greg Garrison              | Nicola Opdycke                  |                                |
| Caeli and Denny Gignoux              | <b>Teresa and Tom Quinn</b>     |                                |
| Cheryl Watkins and Richard Gordon    | Nikki and Doug Reed             |                                |
| Linda Engh-Grady and Dave Grady      | Sue and Hank Ricklefs           |                                |
| Colleen and Peter Grant              | <b>Karen and Ron Rosenberg</b>  |                                |
| <b>Sarah and John Graves</b>         | Leanne Schlinger                |                                |
| <b>Cindy and Joe Gregory</b>         | in memory of Michael Schlinger  |                                |
|                                      | Stacy Schlinger                 |                                |



Brian Schrott

Empire Builder

## CIRCLE OF GIVING

CIRCLE OF GIVING PROVIDES SERIOUS FUNDING TO THE FOUNDATION'S GIVING PROGRAMS

**\$857,000** ..... Circle of Giving Contributions in 2019

**95%** ..... Directly benefits the Community Grant Programs

**5%** ..... Directly supports the operations of Whitefish Community Foundation

**\$5,000** ..... Minimum gift to join the Circle of Giving

We encourage you to join this extraordinary group that is the backbone of the

# GREAT FISH COMMUNITY CHALLENGE



Whitefish Community Foundation provided a percentage match on the first \$20,000 raised by each nonprofit for a maximum matching grant of \$9,800 per nonprofit.

## WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

**THE GREAT FISH COMMUNITY CHALLENGE** supports local nonprofits with an efficient fundraising opportunity that inspires greater giving and participation from the community. It brings local nonprofits together in a single high-profile, collectively beneficial event. Each charity receives designated gifts and has the opportunity for matching grants from the Great Fish Match Fund. In just 5 years, the Great Fish Community Challenge has raised over \$9.8 million for more than 63 local charities.

### 2019 GREAT FISH COMMUNITY CHALLENGE BY THE NUMBERS:

- \$9.8M**.....Total awarded through the Great Fish Community Challenge over 5 years
- \$2.8M**.....Raised in the 2019 Great Fish Community Challenge for 53 charities
- \$1.96M**.....Total matching grants and incentive grants awarded from WCF over 5 years
- 18,148**.....Total number of gifts given through the Great Fish Community Challenge over 5 years



(Photo): **GREAT FISH TOTAL**—Board of Directors announce the total amount raised in the 2019 Great Fish Community Challenge.



## TOTAL RAISED

### BY EACH NONPROFIT PARTICIPATING IN THE 2019 GREAT FISH COMMUNITY CHALLENGE INCLUDING THE MATCH

• Abbie Shelter .....	\$78,648
• Alpine Theatre Project.....	\$56,095
• Backpack Assistance Program .....	\$54,686
• Big Brothers Big Sisters of Flathead Cnty.....	\$38,860
• Bob Marshall Wilderness Foundation.....	\$39,593
• CASA For Kids.....	\$118,963
• Center for Restorative Youth Justice .....	\$51,902
• CF-WF HS Swim Teams.....	\$16,879
• Child Bridge .....	\$181,442
• DREAM Adaptive Recreation .....	\$88,910
• Farm Hands—Nourish the Flathead .....	\$83,890
• Flathead Area Mountain Bikers.....	\$22,288
• Flathead Cancer Aid Services.....	\$33,106
• Flathead Food Bank .....	\$34,914
• Flathead Land Trust.....	\$48,539
• Flathead Rapids Youth Soccer .....	\$27,867
• Flathead Ski Education Foundation .....	\$31,039
• Flathead Youth Home .....	\$48,327
• Friends of the Flathead Avalanche Center.....	\$30,533
• FVCC Foundation .....	\$56,755
• Gateway to Glacier Trail .....	\$17,599
• Glacier Institute.....	\$41,616
• Glacier National Park Conservancy .....	\$65,851
• Glacier Nordic Club .....	\$38,670
• Glacier Symphony and Chorale.....	\$39,395
• Habitat for Humanity of Flathead Valley.....	\$44,443
• Humane Society of NW MT .....	\$117,409
• KRH Foundation—A.L.E.R.T.....	\$30,259
• Lighthouse Christian Home & Services .....	\$42,258
• Montana Kayak Academy.....	\$17,188
• Nate Chute Foundation .....	\$33,703
• North Valley Food Bank .....	\$62,111
• North Valley Hospital Foundation.....	\$55,639
• North Valley Music School .....	\$93,791
• NW Montana Veterans Stand Down .....	\$32,550
• Project Whitefish Kids .....	\$47,008
• Ravenwood Outdoor Learning Center .....	\$35,612
• Samaritan House .....	\$53,700
• Shepherd's Hand Free Clinic.....	\$83,398
• Sparrows Nest of NW Montana .....	\$82,154
• Stumptown Art Studio.....	\$32,356
• Stumptown Ice Den.....	\$75,935
• Tamarack Grief Resource Center.....	\$14,219
• WAG—Whitefish Animal Group.....	\$36,207
• Whitefish Community Foundation.....	\$15,082
• Whitefish Lake Institute.....	\$56,198
• Whitefish Legacy Partners .....	\$101,265
• Whitefish Library Association.....	\$18,870
• Whitefish Review.....	\$33,846
• Whitefish Rotary Charitable Fund.....	\$30,440
• Whitefish School District Education Fdn .....	\$34,056
• Whitefish Theatre Company.....	\$63,457
• Whitefish Veterans Support Team .....	\$46,761



# GREAT FISH SPECIAL AWARDS

The Whitefish Community Foundation gives awards to recognize the work of outstanding nonprofits participating in the Great Fish Community Challenge. The nonprofits are selected for their dedication and, most importantly, their impact on enriching our community as a whole.

## GREAT FISH AWARD

**CASA FOR KIDS** received the Great Fish Award for the significant impact they have in our community and their participation, commitment, and enthusiasm in the Great Fish Community Challenge. They brought awareness to the campaign, which benefited their goals and the goals of all the other participating nonprofits. This award comes with a \$7,500 grant.



*(Photo):*  
CASA for Kids holding the Great Fish Award  
Sally Cameron Russell  
Jamie Campbell  
Betsy and Bill Bayne  
Carol and Tom McElwain



*(Photo):* David Sandler, Julie Tickle and Naomi Morrison accept the Doris Schumm Community Spirit Award on behalf of DREAM Adaptive Recreation

## DORIS SCHUMM COMMUNITY SPIRIT AWARD

**DREAM ADAPTIVE RECREATION** received the Doris Schumm Community Spirit Award for their outstanding work to ensure all community members have access to empowering outdoor recreation opportunities. Their winter ski and snowboard programs provided over 850 adaptive lessons at Whitefish Mountain in the 2018-2019 season to participants of all ages.

Doris Schumm was a dear friend to the Whitefish community and the Whitefish Community Foundation. Her bequest to the Foundation from her charitable remainder trust in 2011 established the Doris Schumm Community Spirit Award. Now in its 7th year, the special award recognizes an organization that embodies the spirit for community that Dorie embraced. This special honor comes with a \$2,500 grant.

## RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD

**WHITEFISH LEGACY PARTNERS** received the Russ and Mary Jane Street Community Service Award for their overall efforts toward education, conservation, and recreation.

The Russ and Mary Jane Street Community Service Award recognizes the important work a nonprofit provides to the community and honors the spirit of Russ and Mary Jane Street's bequest to our community. This special award comes with a \$2,500 grant.



*(Photo):* Alan Myers-Davis, Leslie Hunt, and Mike Jopek of Whitefish Legacy Partners accept the Russ and Mary Jane Street Community Service Award

## OTHER AWARDS

**CORPORATE CITIZENSHIP AWARD:** First Interstate Bank, \$2,500 grant awarded to Nate Chute Foundation

**BIGGEST CATCH AWARD:** \$2,500 awarded to Abbie Shelter (Most donations in the Great Fish Community Challenge)

**POETRY SLAM CONTEST:** \$1,000 grant awarded to Whitefish Review

**BEST NEW FISH ON THE BLOCK:** \$500 grant awarded to Lighthouse Christian Home

**FINEST FISHING AWARD:** \$500 grant awarded to Farm Hands—Nourish the Flathead

**FISH TEAMWORK AWARD:** \$500 grant awarded to Child Bridge

**TOP FISH FORM AWARD:** \$500 grant awarded to Big Brothers Big Sisters of Flathead County

## JEAN HOWARD MEMORIAL AWARD

**ABBIE SHELTER** received the Jean Howard Memorial Award because of their work to promote safety, independence, and empowerment to victims and survivors of domestic and sexual violence. They provide a 24-hour crisis hotline, emergency shelter, mental health services, legal advocacy, and community education.

The Jean Howard Memorial Award was established in 2016. Although Whitefish was Jean's second home, the Whitefish Community Foundation and the community of Whitefish always came first. Each year Jean supported many charitable causes in Whitefish and was active with the Whitefish Community Foundation. This special recognition comes with a \$5,000 grant.



*(Photo):* Bill Howard and Brad Howard present the Jean Howard Memorial Award to Abbie Shelter Executive Director Hilary Shaw, and Development Chair Joy Hawley

WHERE  
GIVING  
RESTORES

# GREAT FISH community challenge

## IMPACT STORIES



### BOB MARSHALL WILDERNESS FOUNDATION

"Great Fish Challenges allowed us to complete a record number of projects in the Bob Marshall Wilderness Complex in 2019, leading a total of 318 volunteers on 73 trips. Challenges supported crews who cleared and maintained 750 miles of trail and eradicated invasive weeds on 203 acres of land. Great Fish funded four wilderness ranger interns, a wilderness conservation corps crew, two packer apprentices, and two artist wilderness connection experiences. The Great Fish Challenge is an essential partner in ensuring all Americans have access to their wilderness heritage, creating more active wilderness stewards for the future. We're so grateful for your support!"

-The staff and board of the *Bob Marshall Wilderness Foundation*

(Photo): Maintenance crews perform conservation work in the *Bob Marshall Wilderness*



### THE CENTER FOR RESTORATIVE YOUTH JUSTICE (CRYJ)

"The Center for Restorative Youth Justice (CRYJ) provides services for more than 200 Flathead Valley teens per year who are involved or at-risk of becoming involved with the justice system. Many CRYJ youth participants represent our community's most under-resourced populations, young people in critical need of support as they navigate challenges both within and beyond their control. In 2018, more than 50% of CRYJ teens reported living at or below the poverty line, 46% had experienced divorce or ongoing conflict in the home, and 12% identified themselves as homeless or "couch-surfing." In addition to these realities, research shows that one of the most significant factors affecting delinquent behavior is the lack of a consistent sense of belonging and empathy for others. Great Fish Community Challenge funds create amazing opportunities for young people to explore personal responsibility, self-awareness, and community engagement through activities that emphasize meaningful life skill development, respectful communication, stress management, direct service to others, creative self-expression, and healthy decision making. In the last year, 70% of CRYJ youth said they felt more connected to community and had an improved outlook on their futures."

-Catherine Gunderson, *Executive Director, CRYJ*

(Photo): At-risk youth at Center for Restorative Youth Justice learn about empathy for others and personal responsibility



### FARM HANDS -NOURISH THE FLATHEAD

"Our mission is to build a strong community food system that fosters socially just ways of accessing food. Through the Great Fish Community Challenge funding, we are able to feed over 270 children in Columbia Falls each week through our weekend backpack program. In 2020, we were able to purchase healthy shelf-stable foods as well as provide a fresh fruit and vegetable snack each week to over 1,000 elementary students. We opened a food pantry at Columbia Falls Junior High as well as the High School. Through these choice pantries, 80 students are able to choose which meals work best for their weekend, while reducing the stigma of sending home prepared bags. In addition, we provided over \$20,000 in direct food assistance to low income community members through our Farmers Market food access programs, keeping all of these funds in our local community. These programs would not be possible without the funds donated through the Great Fish Community Challenge. We are forever grateful for the impact this community and program provides us."

-Gretchen Boyer, *Executive Director, Farm Hands-Nourish the Flathead*

(Photo): *Farm Hands-Nourish the Flathead* volunteers and school staff work together every week to prepare food bags for distribution

### HUMANE SOCIETY OF NORTHWEST MONTANA

"The Great Fish Community Challenge greatly impacts the number of homeless pets and animal lovers that we are able to serve at the Humane Society of Northwest Montana, home of the Charlotte Edkins Animal Adoption. In 2019, we have saved over 463 homeless pets and adopted 449 to animal lovers within the community. The difference the Great Fish Community Challenge makes can always be seen on adoption days with wagging tails and smiling faces."

-Lori Heatherington, *Executive Director, Humane Society of Northwest Montana*

(Photo): *Cheerful Jake (dog)* and his happy family celebrating adoption day



### NW MONTANA VETERANS STAND DOWN & FOOD PANTRY

"The Great Fish Community Challenge helped the NW Montana Veterans Stand Down and Food Pantry to serve over 3,000 homeless and at-risk veterans in 2019. Our Durable Medical Equipment Loan Program has helped 1,128 individuals by providing assistance during illness, accidents, surgery, or end of life. In addition to the monthly food boxes we distribute, we also provide referrals to community resources, case management, free clothing, and household furnishing vouchers. In October 2019, we held our 20th annual Veterans Stand Down in Libby where 800 veterans and their families received a hot meal, haircut, surplus military gear, winter gear, and a supportive community."

-Linda L. Erickson, *Director of Program NW MT Veterans Stand Down & Food Pantry*

(Photo): *NW Montana Veterans Stand Down & Food Pantry* provides services to at-risk veterans and their families





WHERE  
GIVING  
CREATES

**GOING TO THE SUN**

Anonymous (1)  
Mary Jane and Russ Street\*

**HELLROARING PEAK**

Carol and Richard Atkinson  
Cindy and Mogens Bay  
John Kramer  
Byrdie and Ken Wessels  
Ardy and Steve Whisler

**GREAT NORTHERN SUMMIT**

Teri and Jeff Allen  
Janice and James Case  
Anne and John Collins  
First Interstate Bank  
Cindy and Joe Gregory  
William Howard  
Barbara and Mike Jenson  
Teresa and Tom Quinn  
Doris Schumm\*

**BIG MOUNTAIN SUMMIT**

Anonymous (1)  
AGL Foundation  
Elizabeth and William Bayne  
BNSF Railway Foundation  
Sandy and Dick Boyce  
Eileen Bocci Campbell  
Debbie and Robert Douglass  
Bill Duvall  
Glacier Bank  
Michael Goguen  
Cheryl Watkins and Dick Gordon  
Shannon and Brian Haycox  
Michael Honkamp  
Ila B. Dousman Fund  
Ann and Paul Jeremiassen  
Ann and Bill Jones  
Mignon and Jay Latimer  
Sheryl and Dave Lesar  
Maureen and Marlin McKeever  
Schlinger Family Foundation  
David Stewart  
Dori and William Walton  
Boots and Alan Warrick  
Susan and John Witt

\*Deceased

## CUMULATIVE GIVING

This Cumulative Giving Report represents giving over a lifetime to the Whitefish Community Foundation. Included are gifts made directly to the Whitefish Community Foundation's programs free of any personal benefits.

## COMMUNITY IMPACT 2000–2019

Whitefish Community Foundation has seen unprecedented growth in recent years and we can thank our donors for that. Our small town of Whitefish and surrounding communities have also seen incredible growth and along with this comes major difficulties.

Whitefish Community Foundation has awarded millions of dollars to local charities annually through the competitive grant program, Major Community Project Grants, and matching grant program of the Great Fish Community Challenge. We are grateful to all our donors who have partnered with us to address community needs. Working together we are making good things happen in our community. Thank you!

Linda Engh-Grady  
*President,*  
*Whitefish Community Foundation*

**This page recognizes some very dedicated donors whose cumulative giving over the past 10 years has made an extraordinary impact on the work of the Community Foundation and the greater Whitefish area.**

*(Photo) Linda Engh-Grady*



**THANK YOU DONORS for seeing the value  
of our work in the community.  
Your longtime support is making a  
profound impact on many.**



## COMMUNITY GRANT PROGRAM

The **COMMUNITY GRANT PROGRAM** began in 2000 as a way to assist and improve local nonprofits' ability to serve the community.

**\$4.3M** ..... Total amount awarded through all WCF grant programs since 2000

**\$1.74M** ..... Total amount awarded from the Community Grant Program since inception in 2000

**\$91,535** .... Awarded from the 2019 Community Grant Program

### CODE GIRLS UNITED

Code Girls United received a \$4,000 Community Grant to launch an after-school program in the Whitefish School district aimed at teaching fourth through eighth-grade girls to code.

This Kalispell-based nonprofit was established in 2016 to educate girls in computer science, with the goal of increasing the number of females enrolled in post-secondary computer science and technology programs.

This pilot program is open to girls attending any middle school. It provides the opportunity for girls to code in a comfortable setting, and visualize what technology looks like as an exciting future career choice.

*(Photo): Middle school girls attend the Code Girls United after-school program at Whitefish High School Innovation Lab*



### KALISPELL HEART PROGRAM

The HEART Program works to meet basic needs of Kalispell and Evergreen students struggling with homelessness, with the goal of achieving graduation.

The program serves over 425 unique students annually through their HEART Locker free store, HEART Market after-school food program, and HEART Fund, which provides monetary aid for students and families in distress.

Since implementation of the HEART Program in 2012, the Kalispell School District has attained the highest rate of graduation for students experiencing homelessness in Montana.

*(Photo): The Kalispell HEART Program supports students facing homelessness, providing resources to help them reach graduation*



## MAJOR COMMUNITY PROJECT GRANTS



*(Photo): Major Grant presented to Whitefish Sports Facilities Foundation*

**\$589,000**

Awarded since program inception in 2010

**19** Major Grants of

**\$10,000 or more** have been awarded to capital projects in the areas of health and human services, arts and culture, water conservation, veteran services, and more.

**\$30,000** grant

to **WHITEFISH SPORTS FACILITIES FOUNDATION**

for the purchase of an electric ice resurfacer for Stumptown Ice Den.

Stumptown Ice Den, which opened in 2003, hosts thousands of kids and adults for figure skating and hockey programs as well as public skating. The Major Community Grant will help

purchase an electric ice resurfacer that will replace the aging propane fueled resurfacer. Total cost of the project will come to \$129,000 with the charging station and training.

Stumptown Ice Den also participated in the Great Fish Community Challenge raising \$66,135 in public donations and received an additional \$9,800 in matching funds from Whitefish Community Foundation.

## COMMUNITY GRANT RECIPIENTS

- A Ray of Hope–Operations, complete landscaping per city ordinance | \$2,000
- Back Country Horsemen of Montana–Update website | \$2,000
- Big Mountain Firefighters Association–Purchase multi gas detector & Cynokit | \$4,333
- Casting for Recovery–Breast cancer survivor retreat | \$1,200
- City of Whitefish–2019 Stumptown Summer Day Camp scholarships | \$4,000
- Climate Smart Glacier Country–Plastic and wildfire outreach and events | \$2,000
- Code Girls United–Launch Code Girls United after-school program in WF School Dist. | \$4,000
- Crown of the Continent Choir–Purchase risers with safety railings for choir | \$3,804
- Family Forestry Expo–EXPO maintenance materials & student workbooks | \$1,500
- Flathead Audubon Society–Conservation ed. program to improve stewardship of natural resources | \$3,000
- Flathead Community Health Center–Financial assistance for out-patient medication, medical supplies, transportation | \$3,000
- Flathead County Sheriff's Posse–Safety & security development of newly purchased building | \$4,000
- Glacier Children's Museum– Mobile Outreach Program | \$1,400
- Groovetrail–Free musical performances in nursing homes & assisted living facilities | \$1,400
- Hockaday Museum of Art–"Hear The Whistle Blow! Art of the Railroad" Exhibit | \$2,500
- ImagineIF Library Foundation–Early Literacy Kits for new parents | \$1,000
- Kalispell HEART Program–Space utilization and organization at HEART Locker | \$3,967
- Montana Conservation Corps–Enhance parks and recreation sites in and around Whitefish | \$4,000
- Montana State Parks Foundation–Improve Wildhorse Island boat landing and trail signage | \$2,000
- Montana Wild Wings Recovery Center–Support for raptor program | \$2,000
- Riding on Insulin–Ski/snowboard camp for kids with Type I Diabetes | \$2,000
- The Nurturing Center–Safe Havens supervised visitation program | \$3,000
- The Patrol Fund–Send puppy and handler to Avalanche Rescue Dog School in 2020 | \$2,000
- The Vital Ground Foundation–Wild River Project, to acquire 13 acres of grizzly bear habitat | \$2,000
- The Wave Aquatic and Fitness Center–Purchase two new ADA compliant pool lifts | \$4,000
- Whitefish Area Land Trust/Whitefish Housing Authority–Purchase two energy efficient, front loading washer and dryer sets | \$4,000
- Whitefish Community Center–Operating expenses | \$4,000
- Whitefish Firefighters Association–Protective gear for firefighters and EMS, and rescue equipment | \$4,500
- Whitefish Performing Arts Center–Stage in the southwest corner of the PAC Lobby | \$4,000
- Whitefish Safe Grad Night–Safe graduation event at the Wave | \$1,500
- Wings–Financial assistance to offset travel expenses of cancer treatment | \$3,000

WHERE  
GIVING  
LASTS



Whitefish Community  
Foundation is here to help  
you leave a lasting legacy  
according to your wishes.

## LEGACY SOCIETY

The Whitefish Community Foundation Legacy Society is comprised of people who want to create a legacy beyond their lifetime. The Community Foundation ensures donors that their charitable dollars are used in the way they intended. If you have made arrangements in your will, trust, or other deferred gift mechanism with Whitefish Community Foundation as the beneficiary, please let us know.

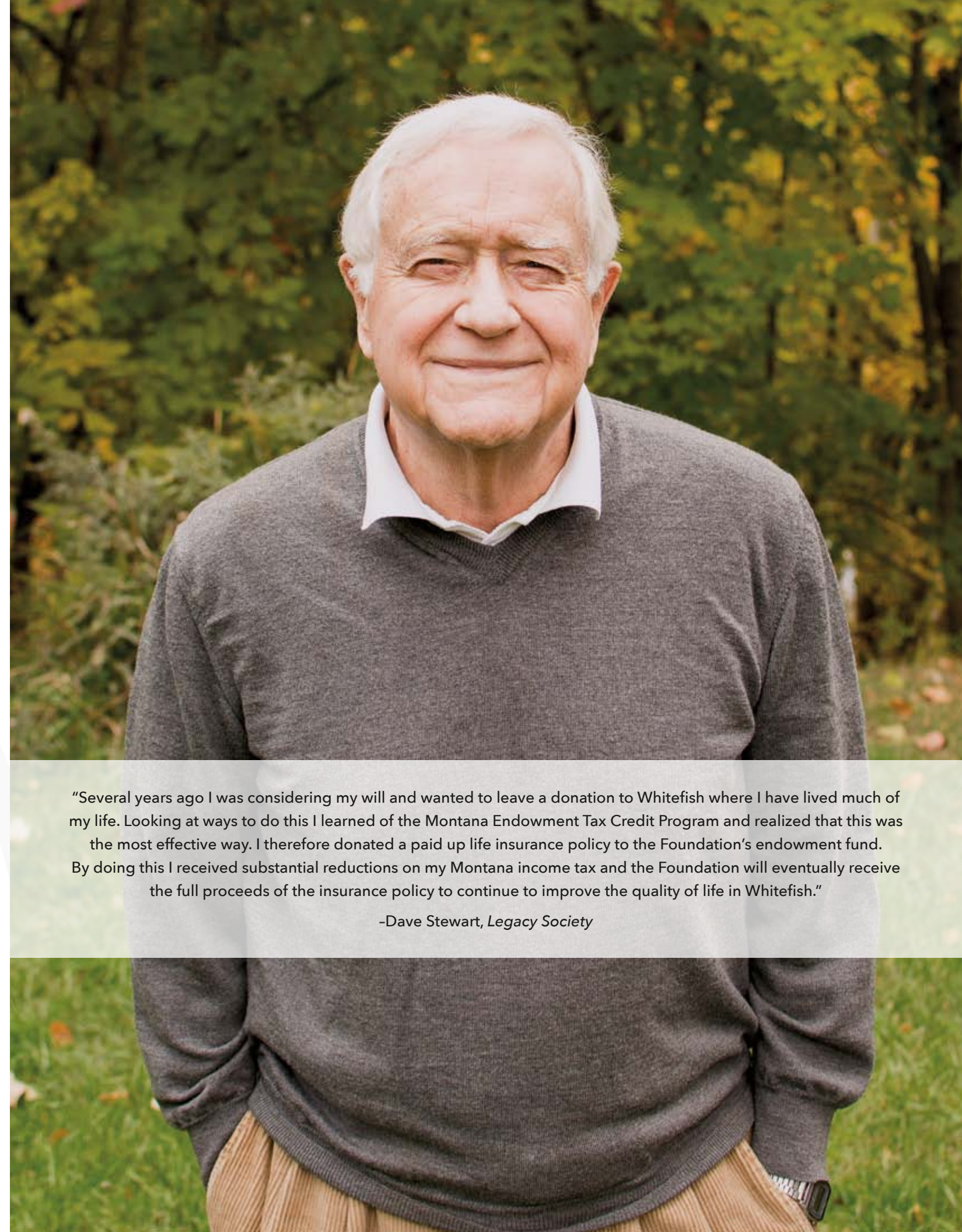
Anonymous (5)  
Carol and Richard Atkinson  
Dorothy and Luther Campbell  
Terry Chute and Jane Kollmeyer Fund  
Anne and John Collins  
C. Granmo Fund  
Connie and Jake\* Heckathorn  
Joaquenia and Klaus Heinrich  
Kristin and Gregory Hetzer  
Thomas A. Hughes, III  
Fay and Peter Jones  
Herbert Kameon Trust\*  
John Kramer Jr.  
Janice and Paul McCann  
Rhona and Jerry Meislik  
Susan and Henry Ricklefs  
Dean A. Robbins (Wiley Homestead)  
SBB Fund  
M & S Schmidt Fund  
Doris Schumm\*  
Janna and Jamie Shennan  
Dave Stewart  
Mary Jane and Russ Street\*  
Jordan and Travis Taylor  
Virginia V. Weldon  
Susan and John Witt

\*Deceased

## LEGACY FUNDS

You can make a bequest in your will and connect it to a Legacy Fund at the Whitefish Community Foundation. The Community Foundation will accept your bequest into a designated endowment fund and use it to support the charities and/or causes you have enjoyed supporting during your lifetime. The Foundation will manage your bequest to allow it to grow and continue to benefit your community in your name and in perpetuity.

**Call us to learn more or to set up your Legacy Fund: 406-863-1781**



"Several years ago I was considering my will and wanted to leave a donation to Whitefish where I have lived much of my life. Looking at ways to do this I learned of the Montana Endowment Tax Credit Program and realized that this was the most effective way. I therefore donated a paid up life insurance policy to the Foundation's endowment fund. By doing this I received substantial reductions on my Montana income tax and the Foundation will eventually receive the full proceeds of the insurance policy to continue to improve the quality of life in Whitefish."

-Dave Stewart, *Legacy Society*



## KIDS FUND— GIVING VOICE TO CHILDREN

Whitefish Community Foundation’s Kids Fund–Giving Voice to Children, will work to provide nonprofit organizations with funding that enables them to better assist our community’s vulnerable and homeless youth. The goal is to move homeless youth from surviving to thriving. The three main areas of focus are to provide safety, educational opportunities, and access to a healthy life, in order to create lasting life changes.

The Kids Fund will work with nonprofits and community partners to fund programs that will do the following:

- Provide advocacy based on identified needs for our most vulnerable youth
- Increase access to educational opportunities, tutoring, growth and graduation, and employment assistance, and job skills training
- Work to prevent youth homelessness by providing effective tools to procure and maintain stable housing
- Meet the basic needs of our youth by providing access to food, clothing, hygiene, and laundry facilities



Whitefish Community Foundation established the Kids Fund in 2019 and was grateful when Dave and Sherry Lesar stepped forward with a \$500,000 pledge to form the Kids Fund Challenge. The Challenge is an effort to build a significant source of funding that will make lasting change for local children suffering from homelessness.



*(Photo): Daria Perez, Vice President of Finance teaches a workshop for nonprofits on bookkeeping.*



*(Photo): Nonprofits attend a workshop for the 2019 Great Fish Community Challenge.*

## NONPROFIT DEVELOPMENT PROGRAM

Whitefish Community Foundation helps nonprofits benefit our community by working with them to create stronger, accountable, and sustainable organizations. The Dennis & Phyllis Washington Foundation has supported Whitefish Community Foundation nonprofit development workshops since 2016, enabling the Community Foundation to provide training to over 1,000 board members, staff, and volunteers through the annual spring workshop program.

In 2019, the Nonprofit Development Program was expanded in partnership with the Tamarack Foundation to meet individual nonprofit needs. This grant program allows Whitefish Community Foundation staff to work one-on-one with applying nonprofits to examine and fix unique problems in the areas of policy development, accounting, financial reporting, branding and grant writing.

In 2019, Foundation staff have had the opportunity to work with the following nonprofit organizations through the Nonprofit Development Program:

- Boys and Girls Club of Glacier Country
- Code Girls United
- DREAM Adaptive Recreation
- Flathead Audubon Society
- Flathead Food Bank
- Friends of the Flathead Avalanche Center
- Glacier Children’s Museum
- Groovetrail
- Intermountain
- Kalispell Regional Healthcare Foundation
- North Valley Food Bank
- Whitefish Community Center
- Whitefish Library Association



WHERE  
GIVING  
MULTIPLIES

Gravity Shots

## DONOR ADVISED FUNDS

Experience a Donor Advised Fund with Whitefish Community Foundation. Your philanthropy is uniquely personal. It reflects your values and your aspirations. It expresses your humanity and your compassion. How can you be certain you'll make the most impact with your contributions?

Whitefish Community Foundation can help you make your charitable giving purposeful and effective. Our experienced staff is able to provide you with insight into community needs. We aim to simplify your giving by taking care of all the administrative work. We will make it easy to manage your giving and make your generosity count.

When you work with us for your charitable giving, 100% of your gifts go to charitable causes, and the administrative fees support the work of the Community Foundation.

Open a Donor Advised Fund with us. The benefits are great!

**100%** of your gifts go to charitable causes.

### DONOR ADVISED FUNDS in 2019:

**\$24M** ..... Total awarded from Donor Advised and Designated Funds since inception in 2000

**\$20.7M** ..... Donor Advised Fund assets

**356** ..... Number of organizations receiving grants since inception

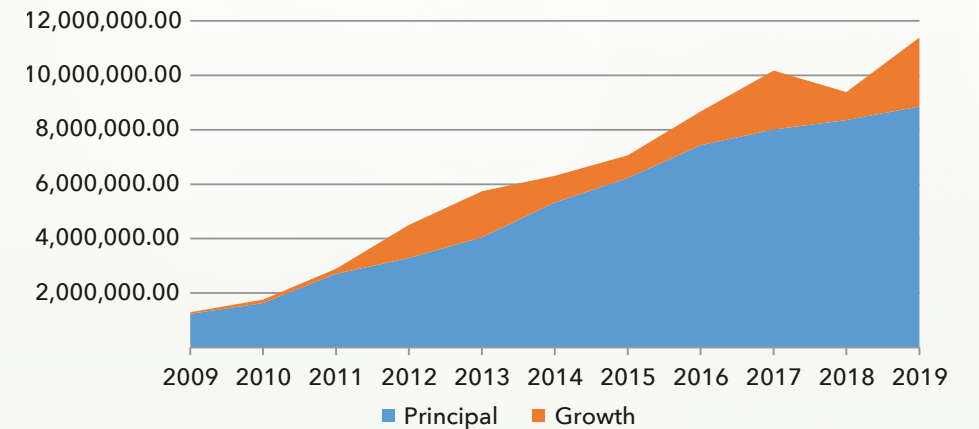
The following nonprofit organizations have set up permanent, irrevocable endowment funds with the Whitefish Community Foundation, demonstrating a commitment to ensuring the future of their programs:

- Abbie Shelter
- Alpine Theatre Project
- Back Country Horsemen of the Flathead
- Bob Marshall Wilderness Foundation
- CASA For Kids
- Child Bridge
- First Presbyterian Church of Whitefish
- Flathead Shelter Friends
- Glacier National Park Conservancy
- Glacier Nordic Club
- Glacier Symphony and Chorale
- Habitat for Humanity of Flathead Valley
- Human Therapy on Horseback
- Humane Society of NW Montana
- Nate Chute Foundation
- North Valley Food Bank
- North Valley Hospital
- North Valley Music School
- North Valley Music School Youth Scholarship
- Patrol Fund
- Shepherd's Hand Free Clinic
- Stumptown Art Studio
- Stumptown Historical Society
- WAVE
- WAG-Whitefish Animal Group
- Whitefish Community Foundation
- Whitefish Community Library
- Whitefish Education Foundation
- Whitefish Library Association
- Whitefish Theatre Company
- Whitefish Legacy Partners

## BUILDING ENDOWMENTS

Whitefish Community Foundation places high priority on building endowment funds to increase nonprofit sustainability. Endowments offer an annual distribution to support the operations of a nonprofit while maintaining the principal and growing over time. The endowments offer a diversified revenue source and demonstrate long-term organizational stability. Endowments also provide donors with a planned giving option.

### 10 YR GROWTH OF ENDOWMENTS



### AGENCY ENDOWMENT FUNDS:

**31** .....Permanent endowment funds

**\$372,016** .....2019 grants distributed from endowment to local nonprofits

**\$385,336** .....Gifts to endowment funds in 2019

**\$2,047,288** .....Total distributions from endowment funds since program inception in 2004

**\$11,383,850** .....In endowed assets

### THE MONTANA ENDOWMENT TAX CREDIT

The Montana Endowment Tax Credit helps build charitable endowments while offering donors a federal income tax deduction and a state tax credit. The tax credit, renewed by the Montana State Legislature through 2026, allows you to earn up to \$10,000 in a state tax credit (\$20,000 if filing jointly). If you would like to learn how the Montana Endowment Tax Credit could work for you, call us at 406-863-1781.

**WHERE  
GIVING  
INVESTS**

The Whitefish Community Foundation makes it easy for you to establish a scholarship fund. We will help you develop selection criteria, distribute scholarship applications in the community, and handle administration of the program. Setting up your own named scholarship fund is a great way to support the education dreams of youth and returning adult students in our community.

**MONTANA  
COFFEE TRADERS  
SCHOLARSHIP  
PROGRAM**

Montana Coffee Traders has been roasting coffee in their vintage farmhouse just south of Whitefish since 1981. The company has continued to grow, and now includes a team of over 115 people across four Flathead Valley locations. To deepen roots in the local community, in 2020 the company made the strategic decision to establish the Montana Coffee Traders Scholarship fund at Whitefish Community Foundation.

In its inaugural year, this program will award \$2,000 in scholarships to further the educational goals of Montana Coffee Traders employees, their families, and Flathead Valley students at large.

**GLACIER  
RESTAURANT  
GROUP-R.I.S.E.  
SCHOLARSHIP  
PROGRAM**

Established in 2016, the GRG-R.I.S.E. Scholarship Program has awarded \$27,000 to eleven employees and their children. These students, each at different stages of their higher education path, have been enrolled at eight different colleges across the country, earning degrees in science, policy, engineering, education, healthcare, and accounting.

To further their commitment to higher education and also support students in their effort to pursue careers in the culinary arts, in 2020 GRG will expand the program to include three \$1,000 scholarships awarded to a culinary arts student enrolled at Flathead Valley Community College, Montana State University, and the University of Montana.

**BRIGHTER FUTURES  
SCHOLARSHIP FUNDS**

Whitefish Community Foundation is pleased to work with businesses and individuals to establish scholarship programs that give back to our community and help young adults reach their educational goals.

To date, three Flathead Valley businesses have established an endowed scholarship fund with Whitefish Community Foundation, investing \$25,000 or more to ensure their scholarship will be awarded in perpetuity. Two programs, the Montana Coffee Traders Scholarship Program and the Glacier Restaurant Group-R.I.S.E. Scholarship Program will award scholarships in 2020. Glacier Medical Associates Scholarship Program will join them to award its first scholarship in 2021, bringing the total annual awards from these three programs to \$15,000.

Whitefish Community Foundation streamlines the entire process by helping individuals and businesses develop selection criteria, guiding candidates through the online application, investing the scholarship fund with the objective of preserving value and fostering growth, and administering the program from start to finish.

**CONSIDER ESTABLISHING A SCHOLARSHIP FUND:**

- When you want to make a difference in the lives of others
- Because you see potential in every student
- Because you understand a college degree increases lifetime earning potential
- To memorialize a loved one
- Because you believe every student should have education opportunities, regardless of their financial situation



Brian Schott

**GIVING BACK  
TO OUR COMMUNITY  
WHITEFISH MOUNTAIN RESORT**

<b>\$1.108M</b>	..... Awarded to benefit local nonprofits since program inception in 2002
<b>\$87,280</b>	..... Supported local nonprofits in 2019
<b>\$20,875</b>	..... Supported the Whitefish 5th Grade Ski Pass Program and DREAM Adaptive Recreation's Adaptive Skiing Program
<b>62</b>	..... Grants awarded to local nonprofits in 2019
<b>46</b>	..... Number of Patron Passes sold each year to benefit charities

The **PATRON SKI PASS PROGRAM** is a partnership between Whitefish Mountain Resort and Whitefish Community Foundation. Proceeds from the sale of passes each year benefit the work of local nonprofits and the Whitefish Community Foundation. The program is a major source of funding for DREAM Adaptive Recreation, supporting adaptive skiing for people with disabilities.

**Thank you Patron Ski Pass holders and Whitefish Mountain Resort for your continued support for our community!**



**WHITEFISH LAKE  
GOLF CLUB**

**WHITEFISH LAKE GOLF CLUB**

The **PATRON GOLF PASS PROGRAM** offers a limited number of transferable golf passes or two individual season passes. Since its inception in 2007, over \$130,000 from the sale of golf passes has benefited the Community Foundation's charitable work to support our nonprofit community. The Patron Golf Pass Program provides vital funding for several of the Community Foundation's grant programs.

**Thank you Patron Golf Pass holders, Whitefish Lake Golf Club, Pro Shop, and Whitefish Lake Restaurant!**

WHERE  
GIVING  
THRIVES

## IN MEMORIAM

### SHIRLEY SCHMIDT (1938-2019)

Shirley Schmidt, a big-hearted and compassionate friend, passed away March 21, 2019. She was born and raised in Kalispell, and graduated from Flathead County High School. She attended college at Bozeman, until her then-husband's career took them to live in the Philippines where they raised their three children, Cindy, Jerry, and Bryon Granmo. Upon returning to Montana, Shirley worked as a successful realtor in Whitefish for over 25 years.

In 1981, she married the love of her life, Mark Schmidt. They developed and ran Forest Acres Mobile Home Park in Whitefish, while Shirley continued to work in real estate and Mark built custom homes. Together they enjoyed a full and exciting life—exploring the Bob Marshall Wilderness on horseback; showing and competing their mules and horses all across the country; and traveling the world, from Argentina to Zimbabwe and all points in between. Shirley walked on the Great Wall of China, climbed Macchu Picchu, boated the Amazon, and dipped her feet in the Ganges River.

She experienced great loss in her life as well, having to bury her two sons before her—Jerry in 1982 at age 22, and Bryon in 2004 at age 40. She is survived by her loving husband Mark, her daughter Cindy Gramo of Whitefish, and her granddaughter Marit of San Diego.

Shirley loved people, animals, and flowers. She grew the most beautiful, well-loved gardens and often shared them with the public through garden tours that benefited local charities. She was passionate about helping children in need and supported many charities that strived to help homeless children get the resources they needed, such as dental and healthcare. Shirley believed in the work of the Whitefish Community Foundation. She and her husband Mark were members of the Circle of Giving and often met with Linda Engh-Grady to discuss the needs in the community and where they could focus their giving. Shirley loved to volunteer her time for her favorite charities. She had a joie de vivre that was contagious and a smile that would light up a room. She will be missed by everyone who was fortunate enough to know her.



### IN MEMORY OF:

Steve Benson  
Marilyn Brown  
Bob Duncan  
Jean Howard  
Dorothy Jenson  
Roland Newton  
Phil Rygg  
Michael Schlinger  
Carolyn Smith

## WHERE GIVING THRIVES, COMMUNITIES THRIVE TOO.

### ROLAND NEWTON (1939-2019)

Roland Newton, devoted husband, father, friend, community leader, banker, and Whitefish treasure, passed away at home in Whitefish on Nov. 5, 2019, with family at his side.

Roland was born on Sept. 28, 1939, in Mead, Colorado, into a remarkable and close-knit Catholic family. Roland was the first of three triplet brothers and the 15th of 20 children.

Roland married his high school sweetheart, Joan "Jo" Becker, in 1962. He attended Colorado State University and the Colorado School of Banking. In 1970 Roland accepted a position at First National Bank in Whitefish and moved Jo and their four young children to Whitefish. Whitefish became home to the Newton family for the next 50 years. In 1978, at the age of 38, Roland became president of First National Bank. He later served as president of First Interstate Bank of Whitefish, retiring in 2004. Roland treasured his relationships with the people that whom he worked with and served.

Roland was very involved in the Whitefish community and gave generously of his time. He ultimately received the "Great Whitefish Award" from the Whitefish Chamber of Commerce in 2006, recognizing his lifetime contributions to the community. He took pleasure in serving on the Whitefish City Council, the Whitefish Parks board, the North Valley Hospital board, the Whitefish Lake Golf Course board, and the Whitefish Community Foundation board, where he served as Treasurer for several years. He was a co-founder of the Gary Norby Golf Foundation and served on the Bulldog Open Committee. Roland also served as president of the Whitefish High School Booster Club, several terms as president of the Whitefish Lake Golf Course board of directors and was a member of the Rotary, Jaycees, in the Winter Carnival Organizing Committee, the Stumptown Historical Society, and St. Charles parish. He helped found the Whitefish Little Dribblers grade school basketball program, providing over 22 years of leadership, fundraising, coaching, and refereeing. He took pride in being inducted into the Whitefish High School Sports Hall of Fame.

Roland loved all things Montana and all things Whitefish. He was a lifelong Dodgers fan, rooted for the Denver Broncos, the Griz, the Cats, the Ducks, the Huskies, and the Zags. Sports took center stage in the Newton family, and they crisscrossed the state as the kids participated in basketball, football, volleyball, track, and golf. An athlete himself, Roland was a starter, along with three of his brothers, on a state championship basketball team, and inductee in the Colorado High School Hall of Fame. He once shot 29 on nine holes at the Whitefish Lake Golf Course.



### ROLAND NEWTON MEMORIAL FUND DONORS:

Craig and Jane Audet  
Sandra Berge  
Edward and Margaret Chianelli  
Coby and Dana Grove  
Jacque and Willo Harris  
Robert Horne  
Doug Johnson  
John Kramer  
Necile Lorang  
Jerry Miller  
Lynne Newton  
Gary Stephens  
James and Anita Welch

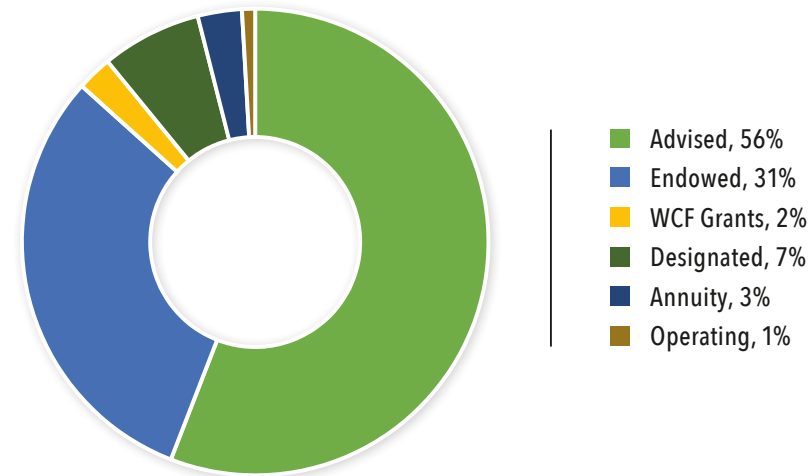
# 2019

## BY THE NUMBERS

### COMPOSITION OF ASSETS 2019 YEAR END

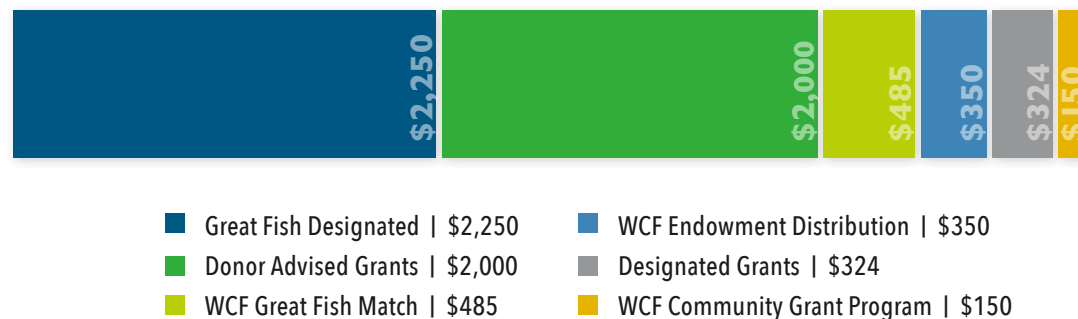
As of December 31 (in thousands)	2019	2018
<b>Total Assets</b>	<b>\$37,001</b>	<b>\$31,160</b>
Total Contributions	\$6,741	\$11,407
Total Additions to Agency Funds	\$195	\$295
<b>Total Gifts</b>	<b>\$6,936</b>	<b>\$11,702</b>
Total Grants & Programs	\$5,584	\$6,168
Total Grants from Agency Funds	\$26	\$57
<b>Total Grant Distributions</b>	<b>\$5,610</b>	<b>\$6,225</b>

### TOTAL ASSETS BY FUND TYPE



### COMMUNITY INVESTING GRANT PROGRAMS

TOTAL ASSETS \$902:



### INVESTMENT COMMITTEE

John B. Collins, *Chair*  
Retired, CEO | John B. Collins Associates

Jeff Allen  
Technology Industry

David Dittman  
President | First Interstate Bank

Greg Garrison  
Retired, Vice Chairman | PwC

Jay Latimer  
Retired | Entrepreneur

Jamie Shennan  
Venture Capital | Trinity Ventures

Dave Stewart  
Retired | International Banking

Ken Wessels  
Retired, CEO | Wessels, Arnold & Henderson

John Witt  
Retired | Bill Matrix Corporation

### FINANCIAL MANAGERS DISCLOSURE

Investment Manager:  
Mason Investment Advisory Services

Custodian: TD Ameritrade

CPA: Sallie Brown,  
JCCS, CPAs, PC, Whitefish

Auditor: Tony Vanorny,  
JCCS, CPAs, PC, Kalispell

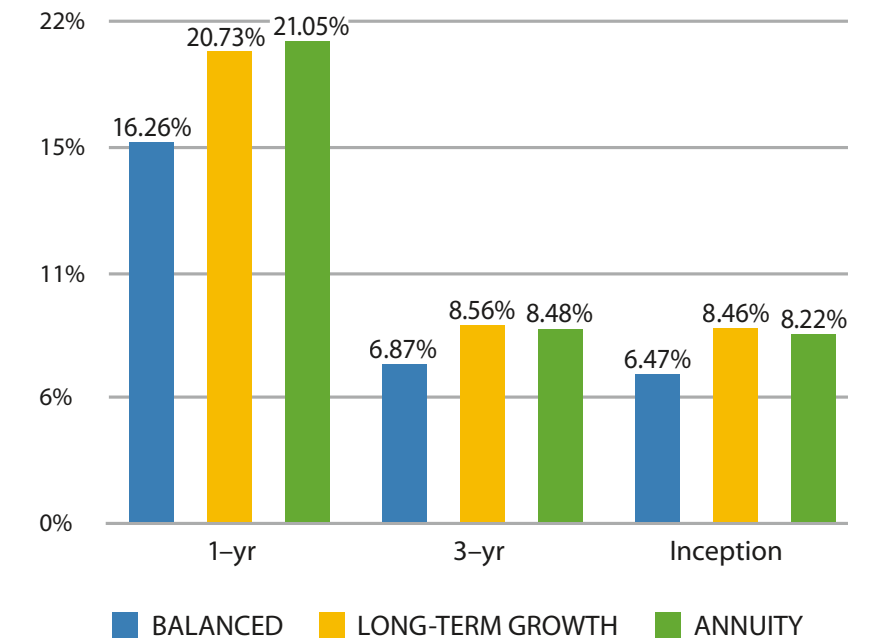
The Whitefish Community Foundation is a public foundation, operating under sections 501(c)(3) and 509(a)(1) of the Internal Revenue code as a public charity. I.D. #81-0533002. Review annual 990 report at [whitefishcommunityfoundation.org](http://whitefishcommunityfoundation.org).

The Whitefish Community Foundation recommends that you seek advice from your tax advisor and/or attorney for all your charitable giving.

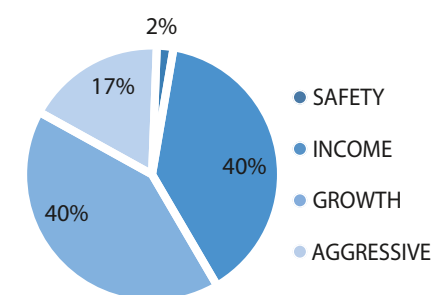
## FINANCIAL STEWARDSHIP

The purpose of the Whitefish Community Foundation's investment program is to provide charitable funds to various community endeavors consistent with our mission, with a primary objective of preserving the value of donor gifts while earning a total return sufficient to support both growth and grant-making. This is achieved through investment in a diverse portfolio designed to maximize returns while minimizing risk and volatility. Our portfolio is managed by Mason Investment Advisory Services and overseen by our Investment Committee, which is comprised of community members with a broad range of investment experience.

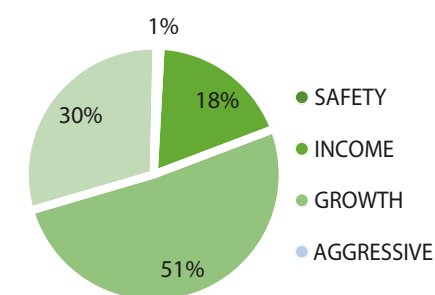
### INVESTMENT RETURNS (ANNUALIZED)



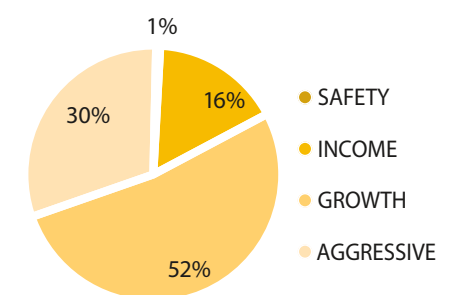
#### BALANCED POOL ALLOCATION



#### ANNUITY POOL ALLOCATION



#### LONG-TERM GROWTH ALLOCATION



Gifts designated to nonprofits through the Great Fish Challenge were acknowledged in the Great Fish Challenge Report and should also be included in each nonprofit's annual report.

# THANK YOU 2019 DONORS!

**THANK YOU 2019 DONORS** who give directly to support Whitefish Community Foundation programs. Every gift counts. Thank you for helping us make a difference in our community.

Anonymous (11)  
AbbVie  
Abel, Kevin and Christine  
Abrams, Judith  
Abruzzo Italian Kitchen  
Adams, Charles and Kathy  
**Adams, William and Olga \***  
AGL Foundation \*  
Akey, Lin and Kathy  
Akey, Rob and Kim  
**Allen, Jeff and Teri \***  
**Alpine Village Centre \***  
Amazon Smile  
Amelon, Peggy Sue  
Appelgren, Brent  
Ashton, Harry and Mary Dojnik  
**Atkinson, Richard and Carol \***  
Baird Foundation  
Baldrige, Summerfield and Julie  
Baltzel, Dean and Sharon  
Barasch, Stephen and Charlene \*  
Barker, Rod and Marianne \*  
Battin, Sharlot  
Bay, Mogens and Cindy \*  
**Bayne, William and Elizabeth \***  
Beightol, James and Dolores  
Bennett, Bob and Caryl \*  
Bennett, Michael and MerryLynn Southers  
Beta Sigma Phi of Whitefish - Xi Omicron  
Big Sky IV Care & Compounding \*  
**Bishop, Rita \***  
BNSF Railway Foundation  
Bocci Campbell, Eileen \*  
Bodman, Whitney and Elizabeth  
Bolser, Jim  
Bonsai Brewing Project  
Boyce, Richard and Sandra \*  
Briley, Robin  
Broussard Charitable Foundation  
Broussard, Rebecca  
Brown, Rockwood \*  
Bruce Boody Landscape Architect  
Bryan, Kirk  
Burton, Paul  
**California Community Foundation \***  
**Campbell, Luther and Dorothy \***  
Carbo, Jamie and Christine  
Carpenter, Joshua and Amber  
Carpenter, Russell and Sandra  
**Carpenter, William and Susan \***  
Carver, Michael  
**Case, James and Janice \***  
Case, John and Patricia  
Casteel, Bob and Patsy \*  
Chaisson, Megan  
**Chaney, John \***  
Chauner, Linda  
**Chickering, Nick and Karen \***  
Chilcutt, Trisha  
Chute, Terry and Jane Kollmeyer \*  
Clearwater Montana Properties  
Cloutier, Jenny  
Cocchiarella, Ronald and Elizabeth  
Cohen, Lawrence and Susan Eberle

Coleman, Victor  
Collier, Beth  
Collins, Janet  
**Collins, John and Anne \***  
Colman, Thomas and Gail  
Cook, Steven  
Cornutt, Linda \*  
Corson, Tim and Deidre  
Coyne, Wendy \*  
Creech, Randy and Kay \*  
Crocker, Dow  
Cubberley, Lyndel  
Curtis, Katherine  
Danczyk, Gary and Annell  
DeBartolo, Edward and Cynthia and Family  
Dennis & Phyllis Washington Foundation  
Dicker, Sharon  
**Dittman, David and Frances \***  
Donaldson, Mark and Lynnette  
Doney, Michael and Jennifer \*  
**Douglas, Robert and Debbie \***  
DuBeau, Don and Jeanne Tallman  
Dulski, John and Brenda  
Dunker, Jerry and Lissa \*  
Dunlop, Blake and Nora  
Dykstra, Bennett and Lynn  
Ellis, Peter and Gwen  
Ericson, Dave and Sarah  
**First Interstate Bancsystem Foundation \***  
**First Interstate Bank \***  
Fischer, Douglas and Marsha  
Fisher, Chris and Katie  
Foley, Patrick and Margaret Askew  
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P.O. Box 1060  
214 West 2nd Street, Suite 1  
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P.O. Box 1060  
214 West 2nd Street, Suite 1  
Whitefish, Montana 59937  
406-863-1781  
[contact@whitefishcommunityfoundation.org](mailto:contact@whitefishcommunityfoundation.org)  
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