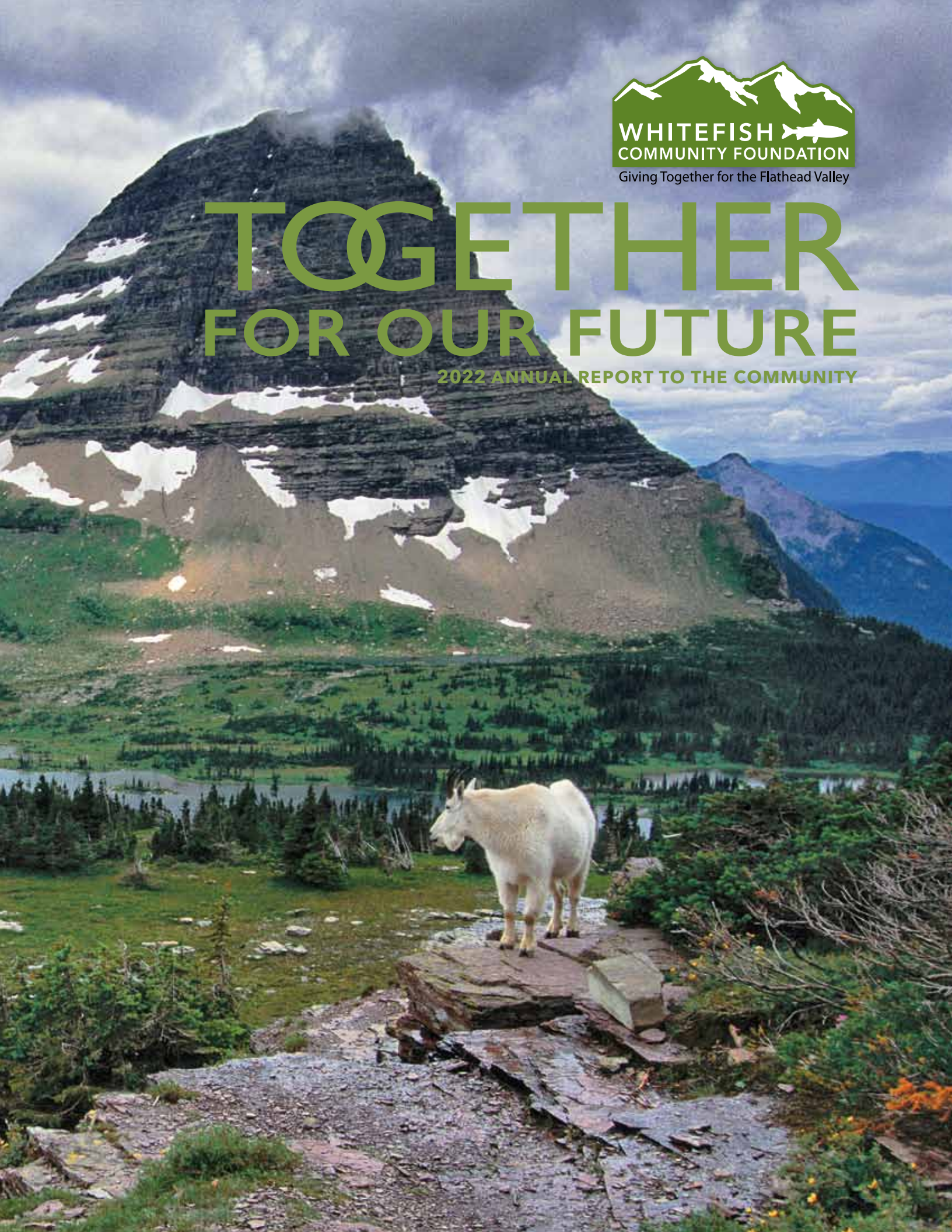




TOGETHER FOR OUR FUTURE

2022 ANNUAL REPORT TO THE COMMUNITY





OUR MISSION:

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

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 Flathead Valley, which includes supporting nonprofits that provide valuable resources to our communities.

2022

ANNUAL REPORT



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COMMUNITY IMPACT

\$69M

CUMULATIVE GRANTS TO
NONPROFITS SINCE 2000

\$33M

TOTAL DONOR ADVISED
GRANTS TO NONPROFITS
SINCE 2000
(more on page 24)

\$22M

GRANTED THROUGH
THE GREAT FISH
COMMUNITY CHALLENGE
SINCE 2015
(more on page 10)

\$2.4M

COMMUNITY GRANTS
AWARDED SINCE 2000
(more on page 14)

\$734,000

MAJOR COMMUNITY
PROJECT GRANTS
AWARDED SINCE 2010
(more on page 16)

FROM THE BOARD CHAIR

Dear Friends,

I continue to believe we are fortunate to live in this special place we all love, despite the challenges that 2022 presented for many families and businesses in the Flathead Valley. People are drawn here for the beauty of the mountains, lakes, rivers, wildlife, and its many recreational opportunities. We make our home here for all these reasons, but **the thing that binds us together is people** who are authentic, kind, caring, and compassionate.

In a year of high inflation and dismal stock market performance, our donors stepped up and contributed a record amount to the Great Fish Community Challenge, helping nonprofits large and small expand their important programs. Our Circle of Giving membership grew, as did the average amount members donated. The number of Donor Advised and Endowed Funds we manage also increased. We are grateful to all of you who have been so generous and put your trust in us. We, along with our donors and the nonprofits we serve, believe whole-heartedly in the future of the Flathead Valley and will continue working non-stop as long as there are unmet needs and problems to solve.

This past year brought with it a change to our organization. Linda Engh-Grady, our incredible leader of 14 years and the driving force behind the Foundation, announced that she would retire at year-end. Much of the success the Foundation has achieved is due to Linda's vision, hard work, and leadership abilities. She constantly challenged all of us to be better and do more, and we wish her all the best on whatever path life leads her down.

In January 2023 we welcomed Alan Davis as our new President/CEO. We are confident his talents and skills are a great fit for the Foundation, and he will continue to grow our organization to meet the needs of our communities. Alan, like Linda, will be supported by an outstanding and very experienced team dedicated to our mission.

On behalf of the entire board and staff, I would like to express my sincere gratitude for your unwavering support. To those of you who are not yet familiar with Whitefish Community Foundation, we invite you to reach out and learn how we can be your partner in giving. We hope you enjoy the stories that follow and find inspiration in the exceptional ways the Foundation, donors, and nonprofits are **working together for our future**.

Warmly,



Ardy Whisler
Board Chair



THANK YOU

LINDA ENGH-GRADY



Heidi Desch/Daily Inter Lake



WELCOME

ALAN DAVIS,
PRESIDENT/CEO



After 14 years at the helm, Linda Engh-Grady retired as the President/CEO of Whitefish Community Foundation on December 31, 2022.

Linda was hired part-time in 2008 to lead the Foundation as its sole employee. At that time, the Foundation was holding \$1 million in assets and had been running grant programs mostly funded by the Board of Directors. Over the next 14 years, Linda's vision, ability to fundraise, and keen desire to support local nonprofits led to exponential growth.

Over her tenure, Linda grew Whitefish Community Foundation's assets to \$56 million, including \$17 million in permanently endowed assets. She transitioned the organization to a fund-accounting system and built a robust Donor Advised Fund program. Today the Foundation awards over \$10 million in grants every year through its various grant programs.

In 2012, Linda began pitching the idea of the Great Fish Community Challenge to the Board of Directors, and over the next few years, infrastructure and staff were put in place to allow the Foundation to manage the campaign. The inaugural Great Fish Community Challenge raised \$1.2 million for 32 nonprofits in 2015. The Challenge has grown year after year, raising over \$5 million for 70 Flathead Valley nonprofits in 2022 alone, and a total of \$22 million for over 85 nonprofits since inception.

With the assistance of the Foundation's Board of Directors, Linda started the Circle of Giving program in 2013, which has grown to provide over \$1 million in grant revenue annually for local nonprofits.

Thank you, Linda, for your many years of hard work and service!

Alan Davis became the President/CEO of Whitefish Community Foundation on January 1, 2023.

I am beyond excited to join the team at Whitefish Community Foundation. It is truly an honor to lead such an amazing organization, and I am inspired every day by our donors and community nonprofits who work tirelessly to improve the lives of so many in the Flathead Valley. Linda's incredible career impacted so many, and I am personally thankful for her guidance and insight during this leadership transition.

I grew up exploring the rivers and mountains of East Tennessee and attended the College of Charleston where I met my wife Frances. Our love of the outdoors brought us to Whitefish in 2014 when Frances got a job as an Occupational Therapist. I quickly started working as Director of Development for Whitefish Legacy Partners, which further strengthened my love of Montana. In 2021, we welcomed twins to our family and could not dream of a better place to raise kids.

As President of the Foundation, I am eager to meet the growing needs of our community and look forward to expanding the momentum of our Circle of Giving and Great Fish Community Challenge. I will work every day with our incredible staff and highly engaged Board of Directors to solve the unique challenges that face the Flathead Valley. If we have not met, I look forward to the opportunity, and please do not hesitate to get in touch!

-Alan Davis, President/CEO



through

GENEROSITY



CIRCLE OF GIVING

The Circle of Giving is Whitefish Community Foundation's core group of donors whose generosity makes all of our grant programs possible, including the Great Fish Match Fund. We encourage you to join this extraordinary group!

\$1,672,729

DONATED TO THE CIRCLE OF GIVING PROGRAM IN 2022

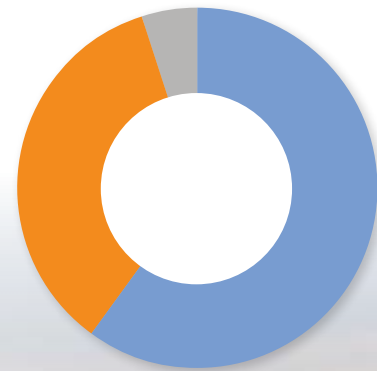
159

DONORS IN 2022

\$10,520

AVERAGE GIFT SIZE IN 2022

2022 ALLOCATION:



- 60% Great Fish Community Challenge
- 35% Community Grants, Major Project Grants, and Micro Grants
- 5% Whitefish Community Foundation's Operations

THE CIRCLE OF GIVING IS THE BACKBONE OF ALL THE COMMUNITY FOUNDATION'S GRANT PROGRAMS.



Jamie & Janna Shennan
Circle of Giving Members

"Whitefish has been our home for nearly 14 years. We love the friendly people, the wonderful outdoor activities and, importantly, the highly motivated and skilled level of philanthropy here.

As a family, we are committed to helping the less fortunate, particularly children. Having been involved in other excellent community foundations elsewhere in the country, we quickly realized the crucial and skilled role that Whitefish Community Foundation plays in the Flathead Valley. We joined the Foundation's Circle of Giving, because we understood the pivotal role the Circle plays in building significant, long-lasting philanthropy. The Circle of Giving is the engine that drives Whitefish Community Foundation's incredible success in building the annual granting levels to an almost unheard-of size for a small community like ours. And we are just beginning! We encourage you to join the Circle for all these reasons.

We are very interested in helping kids, especially underserved youth struggling with mental and physical health. The Foundation has a Kids Fund specifically aimed at finding and supporting solutions to this critical issue. We would encourage all who are interested in making a difference to join us in supporting this program."

Jamie and Janna Shennan have been involved with Whitefish Community Foundation for over 11 years. Jamie served on the Board of Directors for nine years and as Chair of the Nomination/Governance Committee for seven years. During his tenure, Jamie had the idea to start a giving circle to expand the Foundation's grant programs. Today, the Circle of Giving raises more than \$1.6 million annually to support the Foundation's grant programs and the Great Fish Community Challenge. The Shennans believe in the power of permanent endowments as a source of sustainable revenue for nonprofits. With their help, Whitefish Community Foundation's Permanent Endowment Fund has grown to over \$5 million. The Shennans have been strong advocates for the Foundation's Donor Advised Fund Program as a means of simplifying and maximizing charitable giving.



CIRCLE OF GIVING

THE CIRCLE OF GIVING is Whitefish Community Foundation's core group of donors who see the value of philanthropy and what it can do to change lives. Circle members support the mission of the Foundation with an annual gift of \$5,000 or more, with some donors giving as much as \$100,000. The Circle allows donors to pool their resources to create maximum impact multiplied over hundreds of charitable projects and programs throughout the Flathead Valley. The Circle is the backbone of the Foundation's grant programs and the Great Fish Match Fund.



THANK YOU

to our Circle of Giving members for helping us create impactful grant programs and grow the Great Fish Community Challenge into a highly successful fundraising platform for Flathead Valley nonprofit organizations.

Anonymous (2)
AGL Foundation
Teri and Jeff Allen
Kate and Chip Andrews
Brent Appelgren
Val and Beau Armstrong
Mary Dojnik and I.V. Ashton
Carol and Richard Atkinson
Lisa and Bob Bailey
Julie and Summerfield Baldrige
Ledjie and Phillip Ballard
Sharon and Dean Baltzell
Charlene and Stephen Barasch
Trish and Rick Bartoskewitz
Cindy and Mogens Bay
Betsy and Bill Bayne
Dee and Jim Beightol
Tierney and Jon Beizer
Linda and Terry Bell
Bonnie and Rick Billuni
MaryAnn and Bill Bindley
Sandy and Dick Boyce
Tara and Matt Brister
Beth and Jerome Broussard
Rockwood Brown
Lindsey and Todd Burris

Eileen Bocci Campbell
Dorothy and Luther Campbell
Missy and Pat Carlross
Kris and Tom Carlson
Barbara and Tom Carson
Janice and James Case
Maureen Casey
Chrest Foundation
Jane Kollmeyer and Terry Chute
Marie and Brian Clark
Lauren Sparks and Ronald Clearwater
Nadine and Braydon Coburn
Dyan and Michael Colby
C.K. and Jim Coles
Anne and John Collins
Linda Cornutt
Stacy and Michael Covey
Felice and Dow Crocker
Katherine and Gordon Cross
Beverly and Larry Dale
Scott Darkenwald
Candy and Eddie DeBartolo
Jane and Gary Decker
Lynnette and Mark Donaldson
Myra and Michael Doyle
Nora and Blake Dunlop

Lynn and Ben Dykstra
Jennie and Andrew Eckstrom
Margaret Davis and Bruce Ennis
First Interstate BancSystem Fdn
Michael Fraser
Kirsten and Putt Fuller
Fun Beverage
Laura and James Garbacz
Kathy and Greg Garrison
Anne Gentry
Marion and Duff Gerrish
Jamie and Michael Goguen
Adele Goldberg
Cheryl Watkins and Richard Gordon
Linda Engh-Grady and Dave Grady
Cindy Granmo
Colleen and Peter Grant
Sarah and John Graves
Cameron Blake and Sandy Gray
Cindy and Joe Gregory
Jill and Christopher Gwaltney
Jes and John Hagale
Hall-Halliburton Foundation
Mary Lloyd and Dick Harding
Stephanie and Fred Harman
Margo and Gary Harrod

Shannon and Brian Haycox
Kelly and Robert Hayes
Patty and Bob Hayes
Jill and Grant Henderson
Suzanne and Richard Hildner
Jim Hollensteiner
Cheryl and Brad Howard
Ila B. Dousman Fund
Iron Horse Foundation
Margo Jacobs
Reece Jacobsen and Eric Jacobsen
Barbara and Mike Jenson
Ann and Paul Jeremiassen
Ann and Bill Jones
Brenda and Jonny Jones
Robyn and Mark Jones
Sharon and Bill Kahle
Melissa and Pierre Kaptanian
Rachel Kelton
Gina and A.J. King
Maureen and John King
Jon McBride and John Kramer
Julie Williams and Marshal Kushniruk
Cindy and Tom LaChance
Mignon and Jay Latimer
Gerry and Frank Leftwich
Sherry and Dave Lesar
Maureen Bolton and Edwin Lojeski
Kristen Sramek and Josh Lozman
Linda and Charlie Maetzold
Allison and Rick Magnuson
Mary and Patrick Mansfield
Sarabeth and John Martin
Janet Mayo
Libby and Murray McCabe
Rhona and Jerry Meislik

Abbie Milisci
Lori Miller
Ellen and Matt Moran
Barbara Morris
Gloria and Leif Nelson
Terrie and Thomas Nitopi
Nicola Opdycke
Claudine and T.C. Origitano
Val and Larry Parsons
Sandy and Dan Perl
Coco and Ross Pickert
Blanche Puffer
Quinn Family
Nikki and Doug Reed
Melinda and Rick Reed
Reggie's Quick Lube
Sue and Hank Ricklefs
Katie and Mike Robinson
Julie Green and Chris Rommel
Karen and Ron Rosenberg
Laura Reynolds and Walter Rowntree
Kim and George Ruhana
Char Rygg
Stacy Schlinger
Mark Schmidt
Marie and Mike Shaw
Janna and Jamie Shennan
Austine and Vassilis Siomos
Ashley and G. Stacy Smith
Jill and Kevin Smith
Linda Smith
Lucy Smith
Carole and Roger Spragg
Lisa and Jim Stack
Jen and Gus Stein
Margy and Rob Stevens

Kelly and Kim Stimpson
Nancy and David Stokes
Jill and Jim Stroud
Meg and Chris Temple
Edie Tinkler
Heather and Scott Tucker
Kristen and John VanDenburgh
Linda and Andy Viens
Lori and Robb Voyles
Dori and Bill Walton
Katie and Ben Ward
Leslie and Mike Warning
Boots and Alan Warrick
Carol Bibler and Jim Watson
Byrdie and Ken Wessels
Ardy and Steve Whisler
Judy and David Williams
Mary and Hal Williamson
Bet and Doug Wise
Susan and John Witt
Debra Wolf

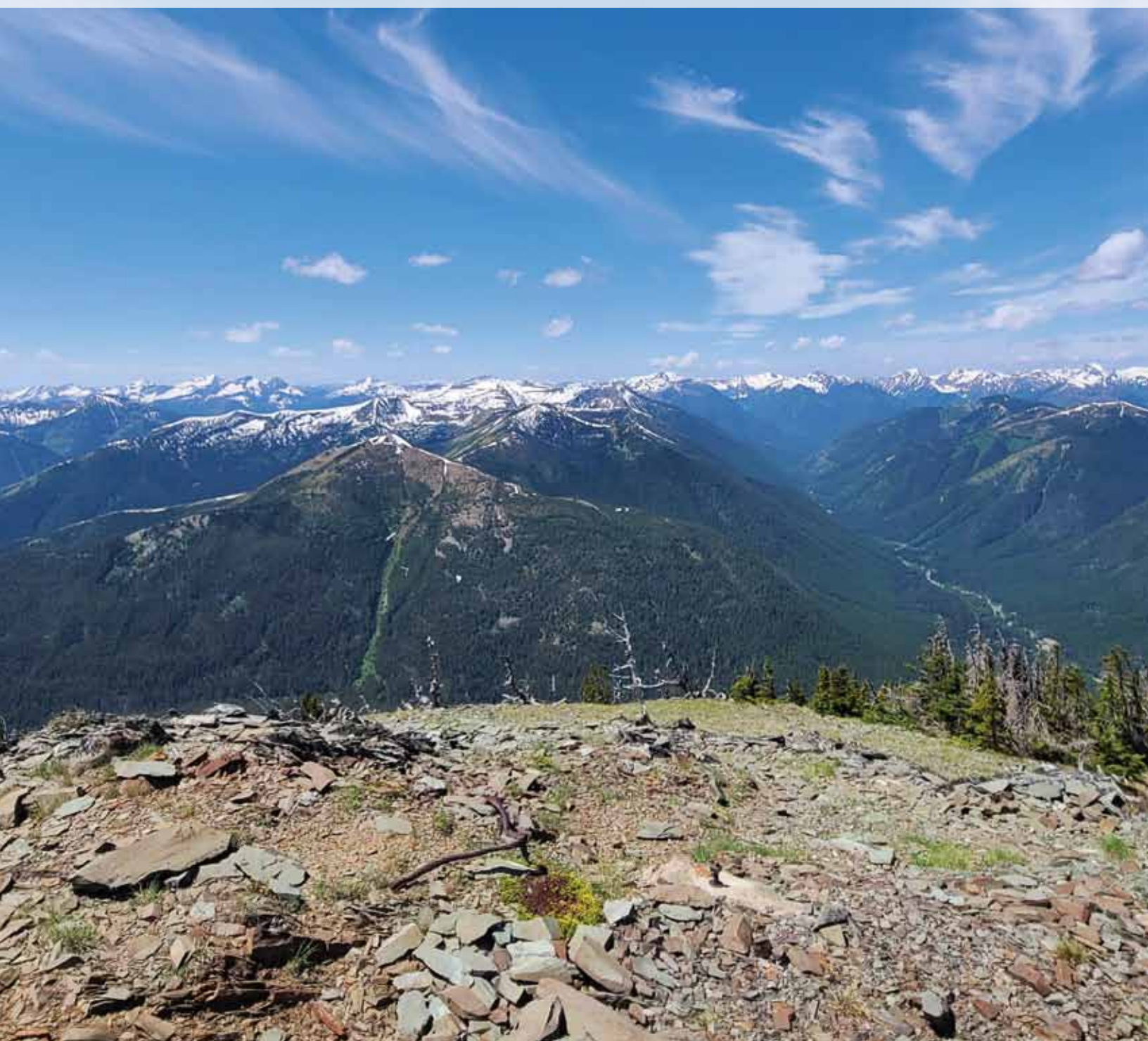
Names in **bold** represent donors who have given at the Circle level for five years or more, demonstrating their long-term commitment to improving the quality of life in the Flathead Valley.

Brian Schott



"I am grateful to Whitefish Community Foundation for providing me with a mechanism to familiarize myself with the valuable contributions that nonprofits make to the Flathead Valley and a vehicle through which I can support their efforts."

-Barbara Morris



Barbara Morris

Circle of Giving Member

"Driving across Montana from east to west for the first time 15 years ago, I was struck by the incredible expanse in every direction. Then, as I looked further into the distance, the view was framed by mountains, lots and lots of mountains. Having spent the previous 30 years in Chicago, viewing all of these mountains was stunning.

As I headed north on Highway 93 to visit my friends in Whitefish, the drive along Flathead Lake where the mountains highlight its eastern shore was truly one of the most beautiful views I had ever seen!

My visit to Whitefish was so memorable that I insisted on returning for several years. There was something so special about the town, its people, and the incredible natural beauty, that it became increasingly difficult to leave. The decision to establish a home in Whitefish came easily.

Once settled, I looked for ways to learn more about this special place. It wasn't long before Whitefish Community Foundation crossed my radar screen as an organization universally respected for its increasing support of the community and its nonprofits through grant programs and the Great Fish Community Challenge.

I am grateful to Whitefish Community Foundation for providing me with a mechanism to familiarize myself with the valuable contributions that nonprofits make to the Flathead Valley and a vehicle through which I can support their efforts.

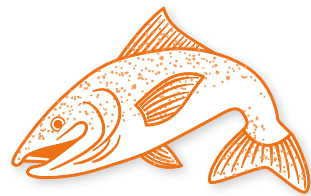
However, the Foundation's support of the community extends beyond traditional grants. During the spring of 2020 when COVID had become particularly severe, the Foundation funded North Valley Food Bank to organize local restaurants to prepare meals for distribution to community members in need. This program helped to address food insecurity while supporting the restaurants during a very difficult time for them.

It is because of its continuing support of many nonprofits in the Flathead Valley and its creative approaches to addressing needs within the community that I am proud to support Whitefish Community Foundation and be a member of its Circle of Giving."

Barbara Morris has been a friend of Whitefish Community Foundation for over a decade and is committed to supporting the work of Flathead Valley nonprofits. She has been a member of the Circle of Giving since 2017 and has continually expanded her support, pooling resources with like-minded donors to create maximum impact.



INSPIRATION through



WCF provided a 59% match on the first \$20,000 raised by each nonprofit for a maximum matching grant of \$11,800 per organization.

GREAT FISH COMMUNITY CHALLENGE

The eighth annual **GREAT FISH COMMUNITY CHALLENGE** raised a record-breaking \$5,080,113 in six weeks for 70 Flathead Valley nonprofits, the highest number of charities to ever participate. Key to the success of the Challenge is the Great Fish Match, made possible by our growing Circle of Giving and other donors who contribute to the match. The Challenge is a game changer for many local nonprofits, providing an efficient platform to build awareness, connect with new donors, and raise critical operating funds. Whitefish Community Foundation organizes the Challenge free of charge for participating nonprofits.

\$22M

RAISED SINCE INCEPTION IN 2015

\$5,080,113

RAISED IN THE 2022 CHALLENGE FOR 70 CHARITIES

59%

MATCH ON THE FIRST \$20,000 RAISED BY EACH PARTICIPATING CHARITY

\$808,405

TOTAL MATCH FUND

MAXIMUM MATCHING GRANT OF \$11,800

21%

INCREASE IN FUNDS RAISED THROUGH THE 2022 CHALLENGE OVER 2021

\$309,558

WCF COSTS TO HOST THE CHALLENGE



TOTAL RAISED

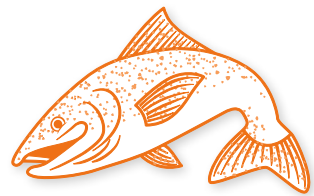
BY THE NONPROFITS PARTICIPATING IN THE 2022 GREAT FISH COMMUNITY CHALLENGE INCLUDING THE MATCH AND SPECIAL AWARDS:

\$5,080,113

Abbie Shelter	\$192,977	Housing Whitefish.....	\$40,952
Amazing Place Music	\$44,602	Humane Society of Northwest Montana.....	\$84,399
Backpack Assistance Program.....	\$97,300	Immanuel Foundation	\$43,310
Big Brothers Big Sisters NW Montana.....	\$42,414	Kalispell School District Education Foundation	\$51,591
Bigfork Art and Cultural Center	\$33,175	Land to Hand.....	\$127,621
Bob Marshall Wilderness Foundation	\$59,671	Lighthouse Christian Home & Services.....	\$118,445
Boys & Girls Club of Glacier Country	\$63,244	Logan Health Foundation	\$149,570
CASA for Kids.....	\$168,276	Logan Health-Whitefish Foundation.....	\$73,648
Center for Restorative Youth Justice	\$70,294	Montana Conservation Corps	\$57,220
Child Bridge	\$115,108	Montana Kayak Academy	\$20,119
Code Girls United	\$19,264	Nate Chute Foundation.....	\$154,461
Conrad Mansion	\$23,269	North Valley Food Bank.....	\$202,602
Creston Firefighter's Association	\$56,478	North Valley Music School	\$90,208
DREAM Adaptive Recreation.....	\$191,261	North West Montana Veterans Food Pantry	\$57,307
Flathead Area Mountain Bikers.....	\$46,742	Northwest Montana Community Land Trust	\$34,419
Flathead Audubon Society	\$39,458	Northwest Montana History Museum	\$46,585
Flathead County Sheriff's Posse	\$30,167	Project Whitefish Kids.....	\$81,287
Flathead Food Bank.....	\$105,978	Ravenwood Outdoor Learning Center	\$36,807
Flathead Land Trust	\$81,479	Samaritan House.....	\$108,372
Flathead Rapids Youth Soccer.....	\$30,715	Shepherd's Hand	\$78,403
Flathead Valley Community College Foundation.....	\$68,965	Sparrow's Nest of NW MT.....	\$134,168
Flathead Valley Ski Foundation	\$43,937	Stumptown Art Studio	\$37,317
Flathead Warming Center	\$156,234	Tamarack Grief Resource Center	\$22,770
Flathead Youth Home.....	\$57,747	The Nurturing Center	\$38,524
Foy's to Blacktail Trails.....	\$41,017	Whitefish Community Center	\$38,649
Friends of the Flathead Avalanche Center	\$42,600	Whitefish Community Foundation.....	\$82,026
Gateway to Glacier Trail	\$38,751	Whitefish Dog Park	\$66,867
Glacier Institute	\$51,919	Whitefish Firefighters Association	\$34,929
Glacier National Park Conservancy	\$113,371	Whitefish Lake Institute	\$73,446
Glacier Nordic Club.....	\$59,325	Whitefish Legacy Partners.....	\$145,229
Glacier Skate Academy	\$32,623	Whitefish Review.....	\$46,783
Glacier Symphony & Chorale	\$58,989	Whitefish School District Education Foundation	\$44,009
Good Grief Group	\$41,415	Whitefish Theatre Co.	\$102,272
Habitat for Humanity of Flathead Valley	\$65,662	Whitefish Veterans Support Team.....	\$90,607
Hockaday Museum of Art	\$51,086	Wings Regional Cancer Support	\$29,678



through
EXCELLENCE



GREAT FISH AWARD \$7,500

SPECIAL AWARD WINNERS

Whitefish Community Foundation recognizes the work of outstanding nonprofits each year.



FLATHEAD WARMING CENTER

The Great Fish Award is given annually to an organization that demonstrates tremendous leadership and dedication toward advancing their mission and impacting critical needs in local communities. Flathead Warming Center was selected as the 2022 Great Fish Award recipient for the organization's work to save lives, link resources, and encourage dignity through low-barrier access to a warm, safe place for those in need.

JEAN AND BILL HOWARD MEMORIAL AWARD \$5,000

The Howard family created this award in 2016 in memory of Jean's philanthropic heart. Bill passed away in 2022, and the award was renamed accordingly. Jean and Bill's grandson Harrison Howard presented the award to Flathead Rivers Alliance on behalf of his family.

FLATHEAD RIVERS ALLIANCE received the Jean and Bill Howard Memorial Award and an accompanying \$5,000 grant for the organization's work to preserve the Flathead River system.

RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD \$2,500

Russ and Mary Jane Street were on the original Board of Directors of Big Mountain Resort and helped found the Whitefish Winter Carnival. In 2002, Mary Jane set up a charitable remainder trust and selected Whitefish Community Foundation as the beneficiary.

WHITEFISH SHINES received the Russ and Mary Jane Street Community Service Award and an accompanying \$2,500 grant for the organization's annual efforts to decorate downtown Whitefish for the holidays and display flower baskets during the summer.



Montana State Parks Foundation and Flathead Land Trust, recipients of the Doris Schumm Community Spirit Award



Gayle MacLaren (R), recipient of the Connie Heckathorn Cheers for Volunteers Award



Nick Polumbus (L), recipient of the Founders Leadership Award



Fun Beverage, recipient of the Corporate Citizenship Award

DORIS SCHUMM COMMUNITY SPIRIT AWARD \$2,500

Doris (Dorie) Schumm was a beloved community member who passed away in 2009. In 2010, Whitefish Community Foundation received a bequest from Dorie, who had the foresight to set up a charitable remainder trust in 1999, a year before the Foundation was founded.

MONTANA STATE PARKS FOUNDATION and **FLATHEAD LAND TRUST** received the Doris Schumm Community Spirit Award for their collaborative work to preserve a popular Flathead Lake public access and recreation site at Somers Beach. Each organization received a \$2,500 grant.

CONNIE HECKATHORN CHEERS FOR VOLUNTEERS AWARD \$2,500

Connie Heckathorn was one of the founders of Whitefish Community Foundation. She passed away in 2020, leaving a rich legacy of community projects and volunteer service.

GAYLE MACLAREN received the Connie Heckathorn "Cheers for Volunteers" Award for her decades of service to local nonprofits, including Project Whitefish Kids, Roundup for Safety, Whitefish School District Education Foundation, and others. Gayle selected **PROJECT WHITEFISH KIDS** to receive the \$2,500 grant that accompanied the award.

FOUNDERS LEADERSHIP AWARD \$2,500

Whitefish Community Foundation co-founder Mike Jenson presented **NICK POLUMBUS** with the inaugural Founders Leadership Award for Nick's dedication of time and expertise to numerous Flathead Valley nonprofit organizations over the past 15 years. Nick selected **NATE CHUTE FOUNDATION** as the beneficiary of the \$2,500 grant that accompanied the award.

CORPORATE CITIZENSHIP AWARD \$2,500

FUN BEVERAGE received the 2022 Corporate Citizenship Award for the company's leadership in philanthropy during the Great Fish Community Challenge. Fun Beverage has generously supported the Challenge for many years and encouraged company employees to donate by matching their contributions dollar-to-dollar. Fun Beverage selected **FLATHEAD FOOD BANK** as the recipient of the \$2,500 grant that accompanied the award.

TWENTY-YEAR CLUB

Whitefish Community Foundation recognized **11 FLATHEAD VALLEY RESIDENTS** who have served a local nonprofit organization for 20 years or more. The following individuals were inducted into the Twenty-Year Club for their long-term commitment to helping ensure the health and sustainability of a nonprofit organization:

- Don Bauder** *Citizens for a Better Flathead*
- Don Bestwick** *Project Whitefish Kids*
- Dr. Suzanne Daniell** *Shepherd's Hand Free Clinic*
- Jim Hollensteiner** *Northwest Montana Historical Society*
- Chris Krager** *Samaritan House*
- Jerry Mahugh** *DREAM Adaptive Recreation*
- Dr. Jon Miller** *Shepherd's Hand Free Clinic*
- Dr. Dan Munzing** *Shepherd's Hand Free Clinic*
- Dr. Kathy Neff** *Shepherd's Hand Free Clinic*
- Everit Sliter** *Conrad Mansion Museum*
- Jennifer Wickland** *North Valley Music School*



through

FUNDING



COMMUNITY GRANT PROGRAM

Whitefish Community Foundation's Board of Directors expanded the Community Grant Program in 2022 to have an even greater impact on local communities. Nonprofits of all sizes were invited to apply for up to \$10,000 in funding for projects and programs serving the Flathead Valley and Eureka. At the annual Community Grants Awards Presentation in June, Whitefish Community Foundation presented \$172,458 in grants for programs and projects benefiting Creston, Evergreen, Eureka, Somers, Bigfork, Columbia Falls, Kalispell, and Whitefish.

41
NUMBER OF NONPROFITS RECEIVING
A COMMUNITY GRANT IN 2022

\$172,458
COMMUNITY GRANTS
AWARDED IN 2022

\$2.4M
COMMUNITY GRANTS
AWARDED SINCE 2000



Flathead Rapids Youth Soccer



Glacier Nordic Club



Senior Mobile Home Repair Program

2022 COMMUNITY GRANT AWARDS

- Amazing Place Music - "Artist Chat" educational programs | \$2,500
- Bigfork ACES - Summer education program for youth | \$5,000
- Bigfork Art and Cultural Center - Exhibit and educational project | \$4,000
- CASA for Kids - Training for advocates in Lincoln County | \$5,000
- Casting for Recovery - Scholarships for local women | \$1,350
- CF-WF High School Swim Teams - Youth swimming | \$3,000
- Children's House Montessori School - Safety upgrades, community garden | \$3,000
- City of Whitefish Fire Department - Airboat for rescue operations | \$10,000
- City of Whitefish Parks and Recreation - Summer camp scholarships | \$5,000
- Code Girls United - Summer camp pilot program | \$5,000
- Columbia Falls Bookmobile - Literacy and food security services | \$5,000
- Creative Arts Council - Scholarships, repairs to building | \$5,000
- Creston Firefighter's Association - Battery-operated extrication system | \$10,000
- Evergreen School District - Evergreen Fitness Team | \$5,000
- Flathead County Sheriff's Posse - Trauma kits | \$3,823
- Flathead Lakers - "Living in the Flathead" guide | \$3,000
- Flathead Rapids Youth Soccer - Relocation of storage shed | \$4,350
- Flathead STEAM Alliance - STEAM Power Your Future | \$3,000
- Flathead Valley Ski Education Foundation - Youth training course | \$5,000
- Glacier Hockey Association - Youth hockey programs | \$5,000
- Glacier Nordic Club - Grooming at Meadow Lake | \$5,000
- Immanuel Foundation - Upgrades to Skilled Care Center | \$3,000
- Montana State Parks Foundation - Preservation of Somers Beach public access | \$5,000
- Montana Wild Wings Recovery Center - Educational programs, care of birds | \$2,000
- Montana Youth Diabetes Alliance - Summer camp | \$2,000
- My Glacier Village - Services for seniors living at home | \$2,500
- Nate Chute Foundation - Youth Empowerment Program | \$5,000
- North Valley Food Bank - Back-up generator | \$10,000
- Northwest Montana Lookout Association - Meals for volunteers | \$3,175
- Postpartum Resource Group - Resources for local mothers | \$2,400
- Riding on Insulin - Youth ski and snowboard camp | \$2,000
- Senior Mobile Home Repair Program - Projects assisting seniors | \$5,000
- Stumptown Art Studio - Baker Street underpass art project | \$2,500
- Tamarack Grief Resource Center - Symposium for counselors and teachers | \$5,000
- The Patrol Fund - Whitefish Avalanche Rescue Dogs | \$3,000
- The Vital Ground Foundation - Conservation of grizzly habitat | \$2,500
- Two Bear Therapeutic Riding Center - Sensory trail stations | \$2,360
- Whitefish Freestyle - Scholarships for youth | \$5,000
- Whitefish Lake Institute - Collection and analysis of sediment | \$4,000
- Whitefish Legacy Partners - Outside Kind | \$5,000
- Whitefish Safe Grad Night - All-night event for Class of 2022 | \$3,000



through

GRANTING

2022 MAJOR COMMUNITY PROJECT GRANTS

\$65,000
AWARDED IN 2022

\$734,000
AWARDED FROM
2010-2022

MAJOR COMMUNITY PROJECT GRANTS

Whitefish Community Foundation's Major Community Project Grant program is dedicated to helping nonprofit organizations complete capital projects that will have a significant and positive effect on communities in the Flathead Valley. Since inception of the program in 2010 through the end of 2022, WCF has awarded 27 Major Community Project Grants.

\$25,000 AWARDED TO LAND TO HAND

To support the relocation of the organization's building next to the Wildcat Garden at Columbia Falls Junior High School. The new location serves as the ideal place for Land to Hand to offer educational programs for children, as well as to store, stage, and deliver food to those in need. Land to Hand provides access to fresh local food through their Food for All Program, including fruit and vegetables grown at the Wildcat Garden. Land to Hand also administers Double Snap Dollars and Senior Coupons and provides Columbia Falls school children with healthy snacks on the weekends and during school closures.

\$20,000 AWARDED TO HOUSING WHITEFISH

To hire its first staff member and begin planning an affordable housing project. Housing Whitefish was founded in 2020 to acquire, create, and maintain permanently affordable housing in the greater Whitefish area and to educate and advocate for low and moderate-income persons. In addition to the Major Community Project Grant from Whitefish Community Foundation, Housing Whitefish received start-up support from Whitefish residents Mark and Robyn Jones and the Whitefish Convention & Visitors Bureau.

\$20,000 AWARDED TO PROJECT WHITEFISH KIDS

To support the construction of six pickleball courts at the Smith Fields Sports Complex. Community leader and philanthropist Carol Atkinson spearheaded the project because she saw a need in the community for additional courts. Project Whitefish Kids is the sponsoring nonprofit organization and donated land for the courts, which will be open to people of all ages.

Photo: Land to Hand received a \$25,000 Major Community Project Grant. The organization's mission is to build a strong community food system that fosters socially just ways of accessing food.



2022 EMERGENCY RESPONSE GRANTS

\$85,000
EMERGENCY RESPONSE
GRANTS AWARDED IN 2022

\$344,200
EMERGENCY RESPONSE
GRANTS AWARDED FROM
2000 TO 2022

EMERGENCY RESPONSE GRANT PROGRAM

Whitefish Community Foundation's Emergency Response Grant Program was created to help local nonprofits resolve unexpected situations that must be addressed immediately in order for the organization to continue fulfilling its mission. Emergency Response Grants are also available to support the mobilization of nonprofit programs during a recognized emergency or disaster in the Flathead Valley.

\$45,000 AWARDED TO SAMARITAN HOUSE

To support the deployment of a temporary shelter for individuals and families displaced by the closure of the Fairbridge Inn & Suites in Kalispell. In addition to a safe place to spend the night, those staying at the temporary shelter received access to showers, laundry, meals, case management, and other community resources while they worked to secure permanent housing solutions.

\$30,000 AWARDED TO FLATHEAD WARMING CENTER

To replace the shelter's failing roof. Flathead Warming Center provides overnight lodging, showers, and laundry access for up to 40 individuals per night during the coldest months of the year. The leaking roof was discovered during the deep of winter and was deemed irreparable. Flathead Warming Center was able to replace the roof with the help of Whitefish Community Foundation's grant and other donations.

\$10,000 AWARDED TO WHITEFISH COMMUNITY SCHOOL

To renovate the nonprofit childcare facility's water-damaged basement. The school was forced to close the basement classroom, nap room, and play area to begin an extensive renovation project due to the damage. Whitefish Community Foundation's Board of Directors approved the grant in recognition of the critical need for quality childcare facilities in the Flathead Valley.

Photo: Flathead Warming Center received a \$30,000 Emergency Response Grant. The organization's mission is to save lives and encourage dignity through low-barrier access to a warm safe place for anyone in need throughout the coldest months.





through

OPPORTUNITY

KIDS FUND GIVING VOICE TO CHILDREN

Early in 2020, Whitefish philanthropists Sherry and Dave Lesar issued a challenge from the Lesar Family Foundation to raise funding to support impactful programs for Flathead Valley children who are suffering from homelessness or are at risk of becoming homeless. Inspired by the Lesar Foundation's challenge, Whitefish Community Foundation created the Kids Fund to support programs in the areas of health, safety, and education that mitigate challenges and prevent youth from becoming homeless. In 2022, Sherry and Dave renewed their support of the Kids Fund when they generously matched \$150,000 in new gifts.



**2022
KIDS FUND
GRANTS**

\$86,000

KIDS FUND GRANTS
AWARDED IN 2022

\$266,000

KIDS FUND GRANTS
FROM 2020-2022

\$30,000 AWARDED TO BOYS & GIRLS CLUB OF GLACIER COUNTRY

To provide afterschool programming to more than 75 K-8 students from Helena Flats School, East Evergreen Elementary, Evergreen Junior High, and the Flathead Crossroads Program.

\$20,000 AWARDED TO CASA FOR KIDS

To support a Youth Case Manager who provides both targeted case management and peer-to-peer support activities to foster youth and alumni age 14-23.

\$36,000 TO FLATHEAD YOUTH HOME

To support a new Youth Advocate position that will work with each resident to develop short and long-term goals and navigate opportunities to help ensure personal success into adulthood.



through

EDUCATION



FLATHEAD NONPROFIT DEVELOPMENT PARTNERSHIP

Whitefish Community Foundation offers free professional development and networking opportunities for nonprofit staff and board members through the Nonprofit Development Partnership (NpDP). In 2022, we offered workshops focused on key areas of nonprofit management to improve oversight, transparency, governance, and more. NpDP programs are funded with support from the Dennis & Phyllis Washington Foundation, the Tamarack Foundation, and the NpDP Permanent Endowment Fund.

8

NUMBER OF FREE
WORKSHOPS IN 2022

88

NUMBER OF NONPROFITS
SERVED IN 2022

4

NUMBER OF NONPROFIT
EXECUTIVE DIRECTOR
ROUNDTABLES IN 2022

342

NUMBER OF NONPROFIT
STAFF AND BOARD MEMBERS
SERVED IN 2022



9

NUMBER OF
STUDENTS RECEIVING
SCHOLARSHIPS IN 2022

\$15,000

AWARDED IN 2022

SCHOLARSHIPS MAKING FUTURES BRIGHTER TOGETHER

Whitefish Community Foundation is pleased to work with businesses and families to establish scholarships that help young adults reach their educational goals. The Foundation professionally manages all aspects of the process from start to finish. We help donors develop eligibility criteria for their scholarship, guide students through the application process, and invest the funds to preserve value and foster growth.

ACTIVE SCHOLARSHIP FUNDS:

- Dorothy and Luther Campbell Scholarship
- Glacier Restaurant Group-R.I.S.E. Scholarship
- Jean Atkinson Driggers Scholarship
- Montana Coffee Traders Scholarship



TYPES OF FUNDS AT WHITEFISH COMMUNITY FOUNDATION

The types of funds we offer at the Whitefish Community Foundation reflect the varied interests of our fund holders and donors. Whether they are advised, designated or unrestricted, new or longstanding, endowed or non-endowed, they are evidence of the spirit of generosity of individuals, families, corporations, and organizations seeking to make a positive impact in our communities today, tomorrow, and forever.



ENDOWMENT FUNDS

Provide support in perpetuity to a charity or project through an annual distribution of revenue based on 5% of the average balance over 20 rolling quarters.



DESIGNATED FUNDS

Are established by a charity or a donor to benefit one or more specific charities, special community projects, or programs.



DONOR & CORPORATE ADVISED FUNDS

Allow an individual, family, or company to establish a charitable fund, then recommend grants while WCF staff administers the grants.



AGENCY FUNDS

Are established by a charity to provide income streams to support programs and operations.



SCHOLARSHIP FUNDS

Are established by a company or individual to invest in the next generation with post-secondary education assistance and build a foundation for a brighter tomorrow.

ENDOWED VS. NON-ENDOWED FUNDS

THE PRIMARY DIFFERENCE BETWEEN ENDOWED AND NON-ENDOWED FUNDS IS THE PERMANENCY.

ENDOWED FUNDS live on in perpetuity and ensure a legacy of giving. They are invested in a long-term growth strategy and follow the current WCF spending policy.

NON-ENDOWED FUNDS are not subject to a spending policy. Donors can grant as much of the fund as they wish during the year. Non-endowed funds can be invested to increase a donor's giving potential over a period of time.



Lucy Smith

Donor Advised Fund Holder, Circle of Giving Member

Lucy Smith is a familiar face to many people throughout the Flathead Valley. As a resident of Kalispell since 1989, Lucy has wholly invested herself in the community through gifts of time, expertise, and funding to local nonprofit organizations. Her leadership, advocacy, and generosity have touched countless lives over the years.

Long-time residents of the Flathead may remember Lucy in her role as Executive Director of Literacy Volunteers, a position she held until an opportunity with an international aid organization took her to Africa for an extended period. Later in her career, she served in various roles with the Hockaday Museum of Art, and eventually, as the Executive Director of the Flathead Community Foundation, where she helped start the Women Who Wine program.

Today Lucy is highly active with the Rotary Club of Kalispell and has been tapped as the District Governor for all of Montana's Rotary clubs beginning in 2025. As a Rotarian, she has traveled to Guatemala numerous times to assist with clean water and sanitation hygiene projects, as well as to Mexico to support education and literacy efforts.

At home in the Flathead, Lucy continues to make an impact on the lives of others as a Donor Advised Fund holder at Whitefish Community Foundation, where she also serves as a Board Member. Through her Donor Advised Fund, Lucy is able to make grants to nonprofits whose work she values.

"The process of making a grant through my Donor Advised Fund is so easy and efficient, and I can be confident knowing that the team at Whitefish Community Foundation is ensuring the nonprofits I give to are legitimate," Lucy said.

Lucy established her Donor Advised Fund at Whitefish Community Foundation as a way of cementing her commitment to giving back to the community she loves. She appreciates knowing that the fees are supporting the Foundation's work to strengthen Flathead Valley nonprofits.

In addition to holding a Donor Advised Fund, Lucy is a member of the Circle of Giving, a core group of donors who pool their resources to support the Foundation's grant programs and the Great Fish Community Challenge Match.

"By being part of the Circle of Giving, I'm helping make larger grants possible," she said. "The combination of having a Donor Advised Fund and being part of the Circle makes me feel like I'm having a greater impact."



through

LEGACIES



THANK YOU,
LEGACY SOCIETY
MEMBERS

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

LEGACY SOCIETY

The Legacy Society is a special group of individuals who share a vision of providing for the needs of future generations through planned gifts to their communities and nonprofit organizations. Whitefish Community Foundation specializes in working with donors to leave a lasting legacy.

You can make a bequest in your will and connect it to a Legacy Fund at Whitefish Community Foundation. A Legacy Fund is a charitable tool that allows donors to make annual distributions to the charities of their choice after they are gone. Whitefish Community Foundation manages Legacy Funds and ensures they are prudently invested and spent according to the donor's wishes.

If you have planned a gift in your will, trust, or other deferred gift mechanism with Whitefish Community Foundation as the beneficiary, please let us know.

Call us at (406) 863-1781 to learn more and to set up your Legacy Fund.

- Anonymous (6)
- Carol and Richard Atkinson
- Mary Van Buskirk and Roger Barber
- Dorothy and Luther Campbell
- Sharon and Hoagy Carmichael
- Terry Chute and Jane Kollmeyer
- Anne and John Collins
- Kathy and Marshall Friedman
- Tanya and Judah Gersh
- Cynthia Granmo
- Connie and Jake Heckathorn*
- Suzanne and Richard Hildner
- Joaquenia and Klaus Heinrich
- Thomas A. Hughes III
- Barbara and Mike Jenson
- Herbert Kameon Trust*
- Steve Knox
- John Kramer Jr.
- Janice and Paul McCann
- Rhona and Jerry Meislik
- Blake Reese Memorial Legacy Endowment
- Susan and Henry Ricklefs
- Dean A. Robbins (Wiley Homestead)
- SBB Fund
- M & S Schmidt Fund
- Doris Schumm*
- Janna and Jamie Shennan
- Nikki and Everit Sliter
- Dave Stewart
- Mary Jane and Russ Street*
- Jordan and Travis Taylor
- Virginia Weldon
- Susan and John Witt

*Deceased



**Thomas
Hughes III**
Legacy Society Member

"My wife, Maria, and I moved to Whitefish in 2015 from Maui, where we had lived for 30 years. Our daughter went to school in Kalispell, and I immediately fell in love with the Flathead Valley. I found the house of my dreams in Whitefish (a 100-year-old Craftsman) and a wonderful neighborhood and neighbors to go with it.

Through neighbors and friends, I became a board member of Whitefish Dog Park and Whitefish Community Center, where I now serve as president. I am also a volunteer ranger at the West Glacier Visitor Center and assist with the Whitefish Meals On Wheels program.

As a nonprofit board member, I participated in the Great Fish Community Challenge for several years and was impressed by the mission and people at Whitefish Community Foundation. Many nonprofit organizations would not exist if it were not for the grants and support of the Foundation.

For these reasons, it was a natural progression to establish a Legacy Fund at Whitefish Community Foundation. It is important to me that the Foundation can continue its work for as long as possible. Even though I may not be here to actively participate, I feel good knowing that I will continue to help many Flathead Valley nonprofits that do such worthwhile work! I encourage anyone thinking about estate planning to take the easy step of becoming a Legacy Fund holder and continue to support our community into the future."

Thomas Hughes III joined Whitefish Community Foundation's Legacy Society in 2017. He has established a legacy that will support the Foundation's grant programs and benefit nonprofit organizations throughout the Flathead Valley in perpetuity.



through

GIVING

DONOR ADVISED FUNDS

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund offers individuals and families the ease and flexibility of giving, similar to a private foundation but without all the expense and administration. When you open a Donor Advised Fund with Whitefish Community Foundation, 100 percent of your gifts go to charitable causes, even the administrative fees support the work of the Community Foundation. We provide donors with insight into community needs and make giving easy, effective, and enjoyable. Donations made to Whitefish Community Foundation qualify for the maximum available charitable deduction in the year the gift is made. Establish a Donor Advised Fund and distribute the gift over time to the charitable organizations you value.

DONOR ADVISED FUNDS BY THE NUMBERS:

\$33M

AWARDED THROUGH DONOR ADVISED FUND PROGRAM SINCE 2000

\$4.3M

AWARDED IN 2022, A 41% INCREASE OVER 2021

59

DONOR ADVISED FUNDS IN 2022

- ENGAGE YOUR FAMILY
- GIVE WITH FLEXIBILITY
- GIVE WITH CONFIDENCE
- GIVE WITH ANONYMITY
- ESTABLISH YOUR LEGACY



Leif & Gloria Nelson

Donor Advised Fund Holders, Circle of Giving Members

"When Leif and I first started dating, he would take me shopping at his family's Central Avenue hardware store after closing. There was something magical about browsing the aisles of the store after the other businesses had closed for the day. Leif showed me what a special place Whitefish was, and I grew to cherish the community as much as he did. We love raising our kids in a place where they have an abundance of opportunities, yet we still know people at the grocery store. As a family, we enjoy biking, camping, and skiing in the Flathead Valley, and we appreciate that many of the things we love to do are made possible by the nonprofits supported by Whitefish Community Foundation.

We first became involved with the Foundation during the old Duck Derby days, when we would race rubber ducks down the Whitefish River to raise money for their grant programs. We joined the Patron Ski Pass Program, because we liked the idea of our ski pass purchase supporting the work of local nonprofits. Our involvement with the Foundation deepened when we opened a Donor Advised Fund in memory of our daughter. We can think of no better way to memorialize her than by giving to many local nonprofits that are doing great work in the Flathead Valley.

We grew up in families that valued giving back and believed that we can make our communities great places to live through gifts of time and money. We hope to teach our children this same legacy. Over the years, we have been involved with the Foundation through our Donor Advised Fund and the Patron Ski Pass Program, and this year we made the decision to join the Circle of Giving as well. The Foundation is an amazing resource for many nonprofits in the Valley and shows what we can truly do when we combine forces and work together."

Leif and Gloria Nelson have been supporters of Whitefish Community Foundation's work for over 10 years. The Nelsons are actively involved with several local nonprofits, including Project Whitefish Kids and Flathead Nordic Backcountry Patrol.



SUSTAINABILITY

through

MONTANA QUALIFIED ENDOWMENT TAX CREDIT

40
NUMBER OF
ENDOWMENTS
HELD BY WCF

\$427,667
IMPACT IN 2022

\$3.16M
IMPACT SINCE 2014

BUILDING ENDOWMENTS FOR NONPROFIT SUSTAINABILITY

Endowments offer nonprofits an annual distribution to support critical operations and programs. As an endowment grows over time, the annual distribution also grows. Holding an endowment allows a nonprofit to have a diversified revenue source and builds long-term sustainability for the organization.

The **MONTANA QUALIFIED ENDOWMENT TAX CREDIT** helps build charitable endowments while offering donors a federal income tax deduction and a state tax credit. The tax credit allows donors to take a Montana state income tax credit of up to \$10,000 (\$20,000 if filing jointly) by making a planned gift to a Montana endowment. Donors can benefit an existing nonprofit endowment or start a new endowment for a nonprofit. Donors can also start a named endowment fund that can be built up and passed down to family for generational giving. **If you would like to learn how the Montana Qualified Endowment Tax Credit could work for you, call us at 406-863-1871.**

NONPROFIT ENDOWMENT FUNDS HELD BY WCF

- | | |
|--|---|
| Abbie Shelter Endowment | Nate Chute Foundation Endowment |
| Alpine Theatre Project Endowment | Nonprofit Development Partnership Endowment |
| Back Country Horsemen Endowment | North Valley Food Bank Endowment |
| Bob Marshall Wilderness Fdn Endowment | North Valley Music School Endowment |
| CASA for Kids Endowment | North Valley Music School Youth Scholarship Endowment |
| Center for Restorative Youth Justice Endowment | Patrol Fund Endowment |
| Child Bridge Endowment | Shepherd's Hand Endowment |
| First Presbyterian Church Endowment | Smith Fields Endowment |
| Flathead Audubon Society Endowment | Somers Beach State Park Endowment |
| Flathead Food Bank Endowment | Stumptown Art Studio Endowment |
| Flathead Shelter Friends Endowment | Stumptown Historical Society Endowment |
| Foy's to Blacktail Trail Maintenance Endowment | The WAVE Endowment |
| Glacier National Park Conservancy Endowment | Whitefish Community Foundation Endowment |
| Glacier Nordic Club Endowment | Whitefish Community Library Endowment |
| Glacier Symphony and Chorale Endowment | Whitefish Dog Park Endowment |
| Habitat for Humanity Endowment | Whitefish Education Foundation Endowment |
| Hockaday Museum of Art Endowment | Whitefish Library Association Endowment |
| Human Therapy on Horseback Endowment | Whitefish Theatre Company Endowment |
| Humane Society of NW MT Endowment | Whitefish Trail Endowment |
| Logan Health-Whitefish Endowment | |



Romeo arrived at the Humane Society of Northwest Montana's Charlotte Edkins Animal Adoption Center in January and was adopted to a wonderful family soon afterward.

Humane Society of Northwest Montana

"Our endowment fund with Whitefish Community Foundation is an essential part of our ability to generate the funds we need to continue our different programs and fulfill our mission of providing a caring and safe environment for dogs and cats until they can be reunited with a forever home.

Whitefish Community Foundation expertly manages our endowment fund, ensuring steady growth of the principal and a reliable annual distribution that helps to secure our long-term financial stability. Thanks to this very important fund, we will have the resources to help animals in our community for years to come."

—Stacie DaBolt, Executive Director, Humane Society of Northwest Montana



CORPORATE PHILANTHROPY

GIVING BACK TO OUR COMMUNITY

WHITEFISH MOUNTAIN RESORT

\$1.4M

AWARDED TO BENEFIT LOCAL NONPROFITS SINCE FUND INCEPTION IN 2002

\$103,756

SUPPORTED LOCAL NONPROFITS IN 2022

\$32,256

SUPPORTED FLATHEAD VALLEY 5TH GRADE SKI PASS PROGRAM AND DREAM ADAPTIVE RECREATION'S WINTER PROGRAMS DURING 2022-23 SEASON

75

NUMBER OF GRANTS AWARDED TO LOCAL NONPROFITS IN 2022

The **PATRON SKI PASS PROGRAM** is a charitable giving partnership between Whitefish Mountain Resort and Whitefish Community Foundation. Program proceeds benefit the work of local nonprofits and Whitefish Community Foundation.

Thank you, Whitefish Mountain Resort and Patron Ski Pass Program members, for your support of Flathead Valley nonprofits!



WHITEFISH LAKE GOLF CLUB

WHITEFISH LAKE GOLF CLUB

The **PATRON GOLF PASS PROGRAM** is a charitable giving partnership between Whitefish Lake Golf Club and Whitefish Community Foundation. Since inception in 2007, the program has raised over **\$180,000** from the sale of golf passes to support the Foundation's charitable work to benefit our local communities.

We are grateful to Whitefish Lake Golf Club, Whitefish Lake Restaurant, the Pro Shop, and program members for your continued support!



Brian Schott

Brian Schott



2022

BY THE NUMBERS

COMPOSITION OF ASSETS 2022 YEAR END

As of December 31	2022	2021
Total Assets	\$51,424,000	\$55,978,000
Total Contributions	\$13,145,000	\$16,608,000
Total Grant Distributions	\$11,167,000	\$9,438,000

HIGHLIGHTS

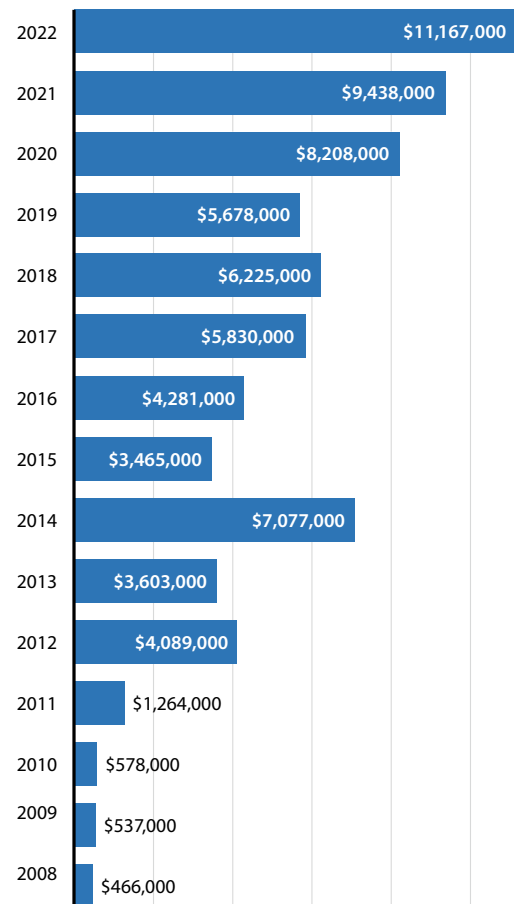
1,646
NUMBER OF
GRANTS AWARDED

312
NUMBER OF NONPROFIT
RECIPIENTS

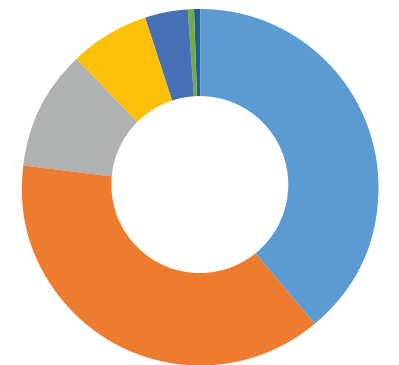
\$6,784
AVERAGE GRANT
AMOUNT

\$35,790
AVERAGE PER
NONPROFIT

GROWTH IN GRANTING

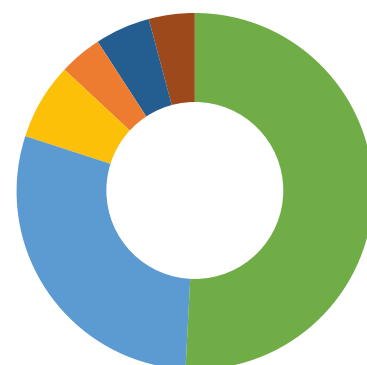


GRANTS DISTRIBUTIONS BY FUND TYPE



- Donor Advised Funds, 39%
- Great Fish Designated Funds, 38%
- WCF Grant Programs, 11%
- Endowment Funds, 7%
- Designated Funds, 4%
- Scholarships, .5%
- Agency Funds, .5%

TOTAL ASSETS BY FUND TYPE



- Advised, 51%
- Endowed, 29%
- Designated, 7%
- Annuity, 4%
- WCF Grants, 5%
- Operating, 4%

INVESTMENT COMMITTEE

Ken Wessels, *Chair*
John Collins
David Dittman
Greg Garrison
Jay Latimer
Mike Shaw
Jamie Shennan
Ardy Whisler
John Witt

FINANCIAL MANAGERS DISCLOSURE

Investment Manager:
Mason Investment Advisory Services

Custodian: TD Ameritrade

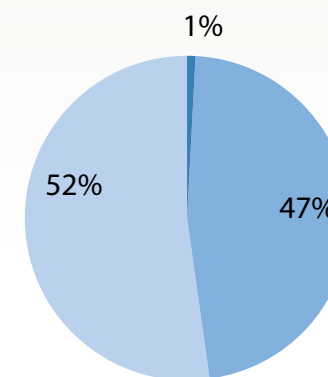
CPA: Sallie Brown,
JCCS, CPAs, PC, Whitefish

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

Whitefish Community Foundation
operates under section 501(c)(3)
of the Internal Revenue code as
a public charity I.D. #81-0533002.
Review annual 990 report at
whitefishcommunityfoundation.org

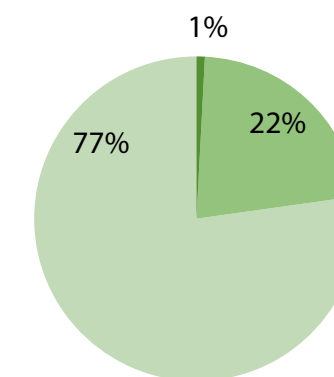
Whitefish Community Foundation
recommends that you seek advice from
your tax advisor and/or attorney
for all your charitable giving.

BALANCED POOL ALLOCATION



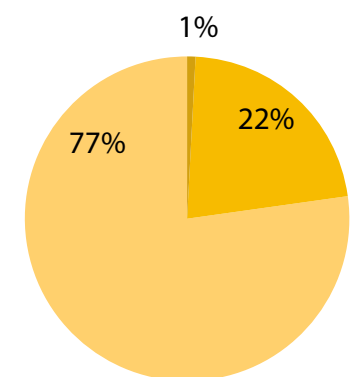
- EQUITY
- CASH
- FIXED INCOME

LONG-TERM GROWTH ALLOCATION



- EQUITY
- CASH
- FIXED INCOME

ANNUITY POOL ALLOCATION



- EQUITY
- CASH
- FIXED INCOME

FINANCIAL STEWARDSHIP

At Whitefish Community Foundation, we take seriously our responsibility to be good stewards of the community assets and donor funds entrusted to us. Our Investment Committee and staff work closely with Mason Investment Advisory Services to ensure that assets are invested according to the policies and objectives of the Foundation. Prudent asset management supports strong grant programs capable of meeting community needs long into the future. We achieve this through investment in a diverse portfolio designed to maximize returns while minimizing risk and volatility.

INVESTMENT RETURNS (ANNUALIZED)

	1-YR	3-YR	5-YR	INCEPTION
Balanced	-11.47%	2.74%	3.56%	4.71%
Long Term Growth	-12.76%	4.62%	4.84%	6.64%
Annuity	-12.6%	4.71%	4.92%	6.56%



THANK YOU, 2022 DONORS!

Thank you for helping us make a difference in our community. We are changing lives together! The following donors gave directly to Whitefish Community Foundation programs:

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

Anonymous (17)
 Abel, Kevin and Christine
Adams, Bill and Olga *
 Adams, Rick
 Agen, Jerry
 AGL Foundation *
 Akey, Lin and Kathy *
 Albert, Chris and Sophie
Allen, Jeff and Teri *
 Anderson, Vernon and Sue
 Andrews, Chip and Kate
 Appelgren, Brent
 Armstrong, Beau and Valerie
 Ashton, I.V. and Mary Dojnik *
Atkinson, Richard and Carol *
 Backslope Brewing
 Bailey, Robert and Lisa
 Baldrige, Summerfield and Julie *
 Ball, Kirk
 Ballard, Phillip and Ledjie
 Baltzell, Dean and Sharon *
Barasch, Stephen and Charlene *
 Barham, Michael and Kristi
 Barker, Rod and Marianne
 Barta, Lee and Noemi
 Bauman Family
Bay, Mogens and Cindy *
Bayne, Bill and Betsy *
 Beale, Paul and Amy *
 Beightol, Jim and Dee *
 Beizer, Jon and Tierney
 Bell, Terry and Linda
 Bennett, Bob and Caryl *
 Big Sky IV Therapy *
 Billuni, Richard and Bonnie
Bindley, Bill and Mary Ann *
Bishop, Rita *
 Blair, Ric and Dawn
 Blumhardt, David and Mary Beth
 BNSF Railway Foundation *
 Boatwright, Carlene
 Boody, Bruce
 Boyce, Dick and Sandy *
 Boyer, Gretchen

Brister, Matt and Tara
 Broste, Nels and Sally
 Broussard Charitable Foundation *
Brown, Rockwood *
 Bunkley, Stephanie and Judson
 Burg, Bill and Kay
 Burris, Todd and Lindsey
 Burton, Paul *
 Campbell, Eileen Bocci *
Campbell, Luther and Dorothy *
 Cannon, Nancy
 Capel, Jenny
 Carlross, Pat and Missy
 Carlson, Tom and Kris
 Carson, Tom and Barbara
 Carstens, James and Sue
Case, James and Janice *
 Case, John and Patricia
 Casey, Maureen *
 Casteel, Bob and Patsy *
 Chaisson, Megan
Chaney, John *
 Chauner, Linda *
 Chercota, Ian
 Church of the Cross
Chute, Terry and Jane Kollmeyer *
 Clark, Brian and Marie
 Clark, Brit
 Clausen, Kim
 Clearwater, Ronald and Lauren Sparks
 Cloutier, Jenny
 Coburn, Braydon and Nadine
 Cohen, Connie
 Colby, Michael and Dyan
 Coles, Jim and C. K.
 Collier, Cary and Kim
Collins, John and Anne *
 Conrad, Paul and Ellie Johnson
 Conry, Michael
 Cornutt, Chris
Cornutt, Linda *
 Corson, Tim and Deidre *
 Courtney, Joe and Jill
 Covey, Michael and Stacy
Coyne, Wendy *
 Cozad, Karl and Kathy
 Crans, Nancy
 Craven, Kurt and Billie Thomas
Creech, Randy and Kay *
 Crocker, Dow and Felice
Cross, Gordon and Katherine *
 Cubberley, Lyndel *
 Curtis, Katherine *
 Dahlman, Tanner
 Dakin, William and Sarah

Dale, Larry and Beverly
 Danczyk, Gary and Annell
 Daniher, Nicci and J.D.
 Darkenwald, Scott
 Davis, Alan and Frances *
 Davis, Larry and Roberta Myers
 DeBartolo, Eddie and Candy *
 Decker, Gary and Jane
 Dennis & Phyllis Washington Fdn *
 Deskins, Asa
 Dicker, Sharon
 Dillon, Gabriel
Dittman, David and Frances *
 Donaldson, Mark and Lynnette *
 Doney, Michael and Jennifer *
 Doyle, Michael and Myra
 Dunlop, Blake and Nora
 Dykstra, Ben and Lynn *
 Eckstrom, Andrew and Jennie
 Edward Jones/Flathead Financial Advisors
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Every effort is made to correctly list and thank each donor who allows us to make a public acknowledgement of their gifts to Whitefish Community Foundation. If your name is missing or incorrect, we apologize for our error. Please contact us with corrections at (406) 863-1781 or contact@whitefishcommunityfoundation.org. Thank you.

IN MEMORIAM

PAUL JOHANNSEN (1960-2023)

The Whitefish community and the Community Foundation lost a great friend and leader this year. Paul Johannsen, past Board Chair of Whitefish Community Foundation from 2008 to 2010, passed away on February 3, 2023 after a courageous fight with cancer. Paul touched the lives of numerous people in our community. Many who never even met Paul were affected by his work.

Paul was an integral part of Whitefish Community Foundation from 2005-2013. He secured the initial funding to hire the Foundation's first Executive Director, Linda Engh-Grady, in 2008. His active leadership supported Linda's work and saw the formation of the Foundation's first fundraising program, the Whitefish Duck Derby. This event catapulted the Foundation's grant programs and community awareness to new levels. Paul always went the extra mile for the Foundation, including acting as the head duck wrangler in the Whitefish River during the annual Derby. No duck escaped his catch!

In 2012, Paul was the Prime Minister of Whitefish Winter Carnival. Soon after, he served as Chair and reorganized the Winter Carnival's 501(c)(3) status. He also started the Carnival's first scholarship program. In 2018, Paul was selected as King Ullr LIX and received the High Ullr Award, the highest honor given for Winter Carnival.

Besides his family, Paul's passions in life were golfing and serving his community. Over the years, Paul served on many nonprofit boards including Flathead County Economic Development Authority, Glacier Airline Enhancement and Outreach, Inc. (Glacier AERO), North Valley Hospital Foundation, and Bulldog Boosters. He was active in fundraising for the Memorial Field Stadium and the 2008 High School Bond Committee.

Paul grew up on a wheat farm in Sunburst, Montana. His family notes that he loved a challenge and a project. He began his career in banking and moved to Missoula where he met his wife, Teddi. Together, they raised their two children, Jordan and Cassandra. In 2003, Paul became President of First Interstate Bank in Whitefish and later went on to become part owner and COO of National Parks Realty. When he wasn't working, his favorite place to be was the Whitefish Lake Golf Course, drinking a Bud Light and telling stories. Paul also served on the nonprofit golf board for several years.

Paul has indeed left his mark on Whitefish and will always be remembered for his community work and leadership. He will be dearly missed but never forgotten. **Thank you, Paul!**



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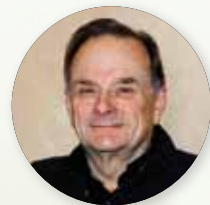
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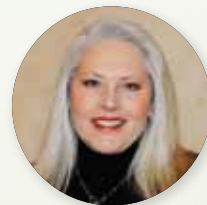
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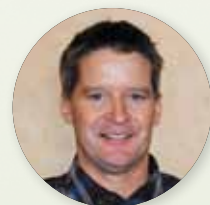
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(Left to right): Jill Seigmund, Alan Davis, Daria Perez, Lynnette Donaldson, and Liz Scholten

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Award-winning photographer Art Wolfe has worked on every continent documenting the dazzling beauty of the planet's wildlife, landscapes, and cultures. An educator, artist, and TV host, Wolfe leads photo tours worldwide, gives inspirational keynotes, and has published over 100 books.
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