



*The Flathead Valley's home for charitable giving for 25 years.*



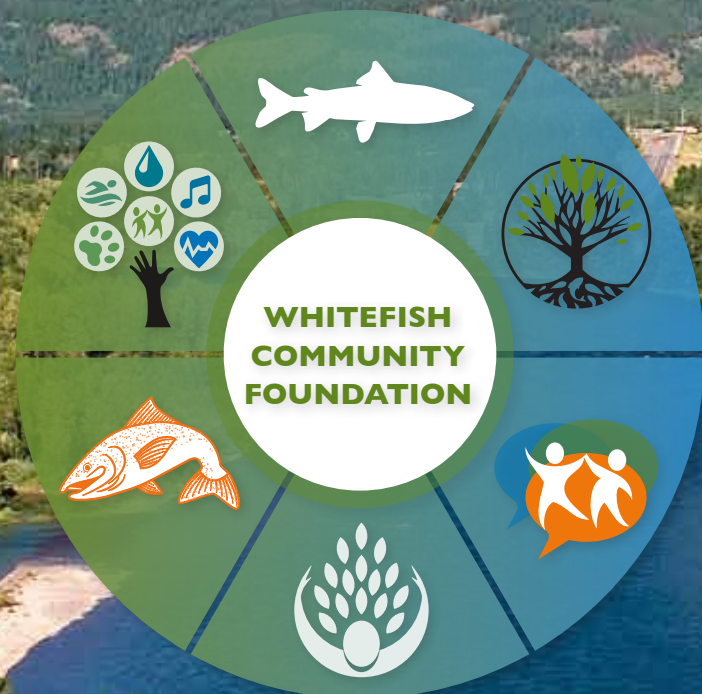
25TH ANNIVERSARY REPORT 2024-2025

**GIVING TOGETHER FOR THE FLATHEAD VALLEY**



## OUR MISSION:

Whitefish Community Foundation is dedicated to fostering philanthropy, building endowments, and helping donors and nonprofits benefit the greater Flathead Valley.



## OUR CHARTER:

- We provide effective ways for donors to support nonprofits
- We advise donors on strategic giving priorities
- We invest charitable dollars to maximize impact
- We grow endowments to sustain nonprofits
- We provide direct funding to fill critical needs
- We lead initiatives that inspire giving
- We strengthen local nonprofits to excel at their missions

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.

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# CELEBRATING 25 YEARS OF IMPACT

Dear Friends,

As the Flathead Valley's home for charitable giving for 25 years, Whitefish Community Foundation is excited to celebrate our rich history and incredible impact.

Thanks to your generosity, we surpassed \$100 million in cumulative granting this year—a milestone that reflects the generosity of donors and the tireless efforts of local nonprofits. We also reached a record \$70 million in assets, ensuring a strong future for the Foundation and the organizations we serve.

These achievements are not ours alone. They belong to every donor, nonprofit partner, and community member who believes in building a better future for the Flathead Valley. Together, we have addressed critical needs, sparked innovation, and strengthened the fabric of our communities.

Since 2000, our mission has guided our work: to cultivate a passion for giving, build endowments, and work hand-in-hand with donors and nonprofits to improve local lives. As we look ahead to the next 25 years, we remain steadfast in that mission—committed to stewarding community resources for maximum, long-term impact.

Thank you for your trust and continued partnership. You are the reason Whitefish Community Foundation continues to grow and thrive. We are honored to work with you and are excited for the future ahead.

With gratitude,

Alan Davis, President/CEO

Greg Garrison, Board Chair



# PLEASE JOIN US IN CELEBRATING OUR 25TH ANNIVERSARY

## CIRCLE OF GIVING

Renew your support or join our Circle of Giving this year! If we secure 250 total members this year, the Circle of Giving Fund will receive a special anniversary challenge gift of \$250,000.

The Circle of Giving is Whitefish Community Foundation's core group of donors who give \$5,000 or more annually to support our grant programs, including the Great Fish Community Challenge. Last year, 200 Circle of Giving members donated \$2.2 million.

## 25TH ANNIVERSARY ENDOWMENT CHALLENGE

\$1.5M MATCH

\$3M

## INVEST IN THE FUTURE OF THE FLATHEAD VALLEY

Help us grow our endowment by \$3 million. This year, all gifts to our endowment will be matched, doubling your investment in the future of the Foundation and the nonprofits we serve.

Our annual endowment distribution covers all administrative overhead costs, ensuring that 100% of donations support nonprofit projects and programs. Help us lay the groundwork to grow and meet the needs of our community for another 25 years and beyond. Your endowment gift may be eligible for the Montana Endowment Tax Credit.

## OPEN A DONOR ADVISED FUND OR CREATE YOUR LEGACY

Simplify your giving by opening a Donor Advised Fund with Whitefish Community Foundation, or work with us to execute the charitable goals in your estate planning.

A Donor Advised Fund (DAF) is a charitable investment account that can be invested in the stock market and support your favorite charities. Whitefish Community Foundation holds \$35 million in DAF assets that are managed by a top industry professional—Mason Investment Advisors. Our fees meet or beat other DAF custodians, and our returns are in the top 10% of community foundations nationally.

Gravity Shots



# OUR FOUNDERS' STORY

BY MIKE JENSON, JOHN KRAMER, AND ROX (FORMERLY ROGERS) HICKS

It has been said that a lot of good ideas start on a napkin. There were more than a few napkins involved when we began meeting at the Buffalo Café over 25 years ago to discuss creating a community foundation to raise charitable funds for local nonprofit programs and projects. Joining us at that table so many years ago were the late Connie Heckathorn and Dave Stewart. We were a diverse group of community members who shared a love for our little town and wanted to improve the quality of life for everyone living here.

In those early days, we faced skepticism from some of the very nonprofits we set out to help. They worried that the community could not afford to support yet another nonprofit. Our job was to show the nonprofits that we weren't there to compete for a slice of the pie; we were there to make the pie bigger. We set a lofty goal for ourselves to grant \$10 million dollars within 10 years. We pulled out our personal checkbooks to award the very first grants, and our Community Grant Program was born.

Today, as we reflect on the 25th anniversary of Whitefish Community Foundation, we are humbled by the more than 10,000 donors who have made it possible for us to grant over \$100 million since 2000! These grants have championed health and education initiatives, addressed critical issues such as hunger and homelessness, and protected our wildlife and surrounding landscapes. The pie continues to grow, supporting nonprofits throughout the Flathead Valley. One of the Foundation's most popular grant programs, the Great Fish Community Challenge, has raised over \$35 million for nonprofits in Kalispell, Columbia Falls, Bigfork, Creston, Hungry Horse, and Whitefish.

How far we've come since those first grants that were written from our own checkbooks! As Whitefish Community Foundation lays the groundwork to meet the needs of the Flathead Valley for another 25 years, we encourage everyone living here to get involved in the ways that are most meaningful to you.

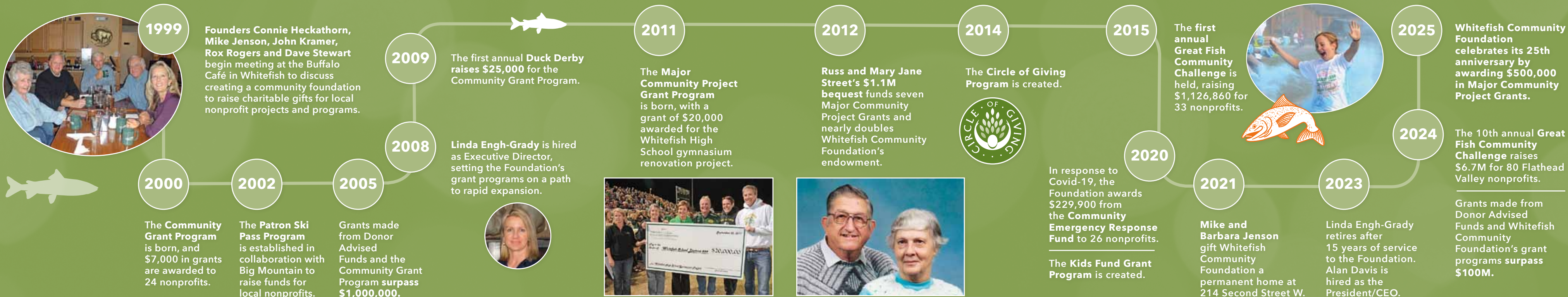
Perhaps this is the year your family opens a Donor Advised Fund or joins the Circle of Giving. Maybe you will make a first-time gift through the Great Fish Community Challenge, or the local nonprofit you serve will apply for a grant.

As the Flathead Valley's home for charitable giving for 25 years, Whitefish Community Foundation offers an opportunity for all of us to make a positive difference. We hope you will join us!

*"...we are humbled by the more than 10,000 donors who have made it possible for us to grant over \$100 million since 2000!"*



## TIMELINE OF MAJOR MILESTONES FROM 1999 TO 2025





## CIRCLE OF GIVING

The Circle of Giving is Whitefish Community Foundation's core group of donors who give \$5,000 or more annually to support the grant programs and mission of Whitefish Community Foundation. Circle donors pool their resources to multiply their impact and provide critical funding to hundreds of local nonprofits serving the Flathead Valley.

### 2024 ALLOCATION:

82.5% 17.5%

#### DIRECT GRANTS TO LOCAL NONPROFITS

The Circle of Giving is the backbone of all of the Foundation's grant programs, including the Great Fish Match Fund, Community Grant Fund, Major Project Grant Fund, and Emergency Response Fund.

#### WHITEFISH COMMUNITY FOUNDATION

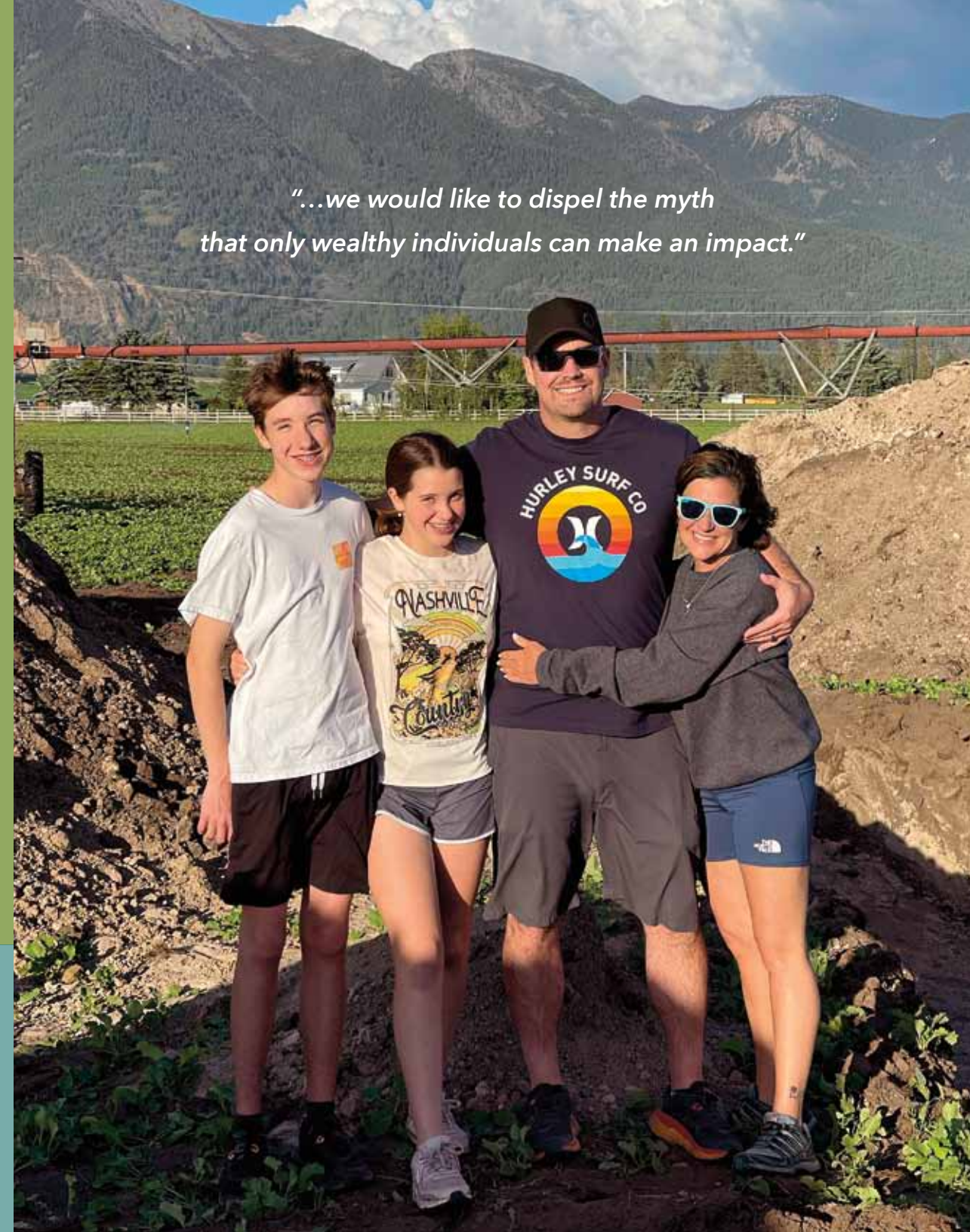
The Circle of Giving is the engine that keeps Whitefish Community Foundation running. Funding supports direct costs to host the Great Fish Community Challenge and our Nonprofit Development Program. All administrative overhead costs are covered by the Foundation's separate annual endowment distribution, ensuring 100% of Circle of Giving donations benefit local nonprofit programs.



250 MEMBERS = \$250,000 BONUS

If we secure 250 total members this year, the Circle of Giving Fund will receive a special anniversary challenge gift of \$250,000.

This bonus gift will directly benefit local nonprofits through our many grant programs, including the Great Fish Match.



*"...we would like to dispel the myth that only wealthy individuals can make an impact."*

## BRENDEN & KARYN CRAIG

CIRCLE OF GIVING MEMBERS

I was blessed to be born and raised in the Flathead Valley. My family homesteaded the Lake Five area near Glacier National Park five generations ago, and Karyn grew up in a ranching community in central Montana. We met in Bozeman where we both attended Montana State University. When I graduated from college, I began a career with First Interstate Bank and was able to move back home to the Flathead Valley. Karyn and I are thankful to raise our children in such an incredible place.

We joined the Circle of Giving because we were inspired by the passion this diverse group of people has for improving the quality of life for everyone in the Flathead Valley. It is motivating to be around people who are focused on investing in our communities and helping those in need.

We live in Columbia Falls, and I now work in Kalispell after having worked in Whitefish for many years. We love all of these communities, and we appreciate that the Circle of Giving makes it possible for the Foundation to support nonprofits throughout the Flathead Valley with grants. We are amazed by the momentum of the Great Fish Community Challenge and are proud to be part of the group that funds the Great Fish Match.

As an upper middle-class family, we would like to dispel the myth that only wealthy individuals can make an impact. Karyn and I are intentional about our giving and must budget accordingly to ensure we honor our priorities. We are not able to make five-, six-, or seven-figure donations, but we know that every dollar counts. We trust Whitefish Community Foundation to maximize every dollar received so our nonprofits remain healthy and vibrant.

GENEROSITY OF



\$2.2M  
DONATED TO THE  
CIRCLE OF GIVING  
PROGRAM IN 2024

200  
DONORS IN 2024

\$10,811  
AVERAGE GIFT SIZE  
IN 2024

*"We were first introduced to Whitefish Community Foundation when the founders were brainstorming over morning coffee at our family's business, the Buffalo Café. As we watched the Foundation grow, we were impressed by the positive impact this energized organization was having in our community by bringing together committed donors and nonprofits to benefit our Valley and lift our neighbors in need. It was an easy decision to become involved and join the Circle of Giving as a tangible way to give back."*

—Linda and Charlie Maetzold



# THANK YOU TO OUR CIRCLE OF GIVING MEMBERS

FOR LIFTING UP THE ENTIRE NONPROFIT COMMUNITY AND INSPIRING THE FLATHEAD VALLEY TO GIVE.



Anonymous (4)  
**AGL Foundation\***  
**Teri and Jeff Allen\***  
 Lisa and Ole Anderson  
 Kate and Chip Andrews  
 Brent Appelgren  
 Valerie and Beau Armstrong  
 Kiita Foundation  
 (Jo-Ann and Jim Armstrong)  
 Mary Dojnik and IV 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  
 Lana and Joe Batts  
**Cindy and Mogens Bay\***  
**Betsy and Bill Bayne\***  
**Dee and Jim Beightol**  
 Tierney and Jon Beizer  
**Linda and Terry Bell**  
 Kathy Friday and Alec Biele  
**Bonnie and Rick Billuni**  
**Mary Ann and Bill Bindley**  
 Lannette and Todd Bloom  
**Sandy and Dick Boyce\***

Bev and Robert Braig  
 Anne and Bud Brigham  
 Tara and Matt Brister  
 Deb and Matt Brooks  
**Beth and Jerome Broussard**  
 Carissa and Mark Brown  
 Karen and Ethan Budin  
 Ann and Brad Bulkley  
 Lindsey and Todd Burris  
**Eileen Bocci Campbell**  
**Dorothy and Luther Campbell**  
 Thomas Campbell  
 Kris and Tom Carlson  
**Janice and James Case\***  
**Maureen Casey**  
 Helen and Larry Cates  
 Chrest Foundation  
 Heather and Bill Christopher  
**Jane Kollmeyer and Terry Chute**  
 Brian Clark  
 Lauren Sparks and Ron Clearwater  
 Nadine and Braydon Coburn  
 Dyan and Michael Colby  
 Ann and Andrew Cole  
 Liz and Stewart Coleman  
**C.K. and Jim Coles**  
**Anne and John Collins\***  
**Linda Cornutt**  
 Stacy and Michael Covey  
 Karyn and Brenden Craig  
 Felice and Dow Crocker  
**Katherine and Gordon Cross**

**Beverly and Larry Dale**  
 Nicci and J.D. Daniher  
 Frances and Alan Davis  
 Stephanie and Davis Deadman  
**Candy and Eddie DeBartolo**  
 Jane and Gary Decker  
**Lynnette and Mark Donaldson**  
 Myra and Michael Doyle  
**Nora and Blake Dunlop**  
 Kate and Ross Dworman  
 Lynn and Ben Dykstra  
 Margaret Davis and Bruce Ennis  
 Linda and Jim Farley  
 First Interstate BancSystem Fdn  
 Margaret Askew and Patrick Foley  
 Kate and Michael Fraser  
 Laurel and Matt Frazer  
 Kirsten and Putt Fuller  
**Barbara and Sean Gallagher\***  
**Laura and James Garbacz**  
 Lindsey and Keith Gardner  
 Robin and Tyler Gardner  
**Kathy and Greg Garrison**  
 Janelle Gentry  
 Jamie and Michael Goguen  
 Adele Goldberg  
 Davey Gordon  
**Cheryl Watkins and Dick Gordon**  
 Andrea Sliter Goudge  
**Linda Engh-Grady and Dave Grady**  
**Cindy Granmo**  
**Colleen and Peter Grant**

**Sarah and John Graves\***  
**Cameron Blake and Sandy Gray**  
 Jeanine and Ken Green  
**Cindy and Joe Gregory\***  
**Jill and Chris Gwaltney**  
 Michelle and Cyrus Hadidi  
**Jes and John Hagale**  
 Hall-Halliburton Foundation  
 Dana Hanna  
**Mary Lloyd and Dick Harding**  
**Stephanie and Fred Harman**  
 Sadie and Evan Harris  
 Suzy and Clay Harrison  
**Margo and Gary Harrod**  
 Camilla and Barnes Hauptfuhrer  
**Shannon and Brian Haycox**  
 Kelly and Bob Hayes  
**Patty and Bob Hayes**  
 Iona McMillan and Dennis Heinzig  
**Jill and Grant Henderson**  
 Lisa and Doug Hickok  
**Suzanne and Richard Hildner**  
 Jim Hollensteiner  
**Ila B. Dousman Fund\***  
**Iron Horse Foundation\***  
 Margo Jacobs  
 Lou Anne and Jeff Jensen  
**Barbara and Mike Jenson\***  
**Ann and Paul Jeremiassen\***  
 Leslie and Dan Johnson  
 Brenda and Jonny Jones  
**Robyn and Mark Jones**

Pat and Sam Jones  
**Ann and Bill Jones**  
 Sharon and Bill Kahle  
 Melissa and Pierre Kaptanian  
 Melinda and Mike Kartsonis  
 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  
 Ginny and Frank Larence  
**Mignon and Jay Latimer**  
**Gerry and Frank Leftwich**  
 Lindsay Cross-Lerou and Thomas Lerou  
**Sherry and Dave Lesar\***  
 Susan Stevenson and David Littleton  
 Maureen Bolton and Edwin Lojeski  
 Kristen Sramek and Josh Lozman  
 Steve Lull  
**Linda and Charlie Maetzold\***  
**Allison and Rick Magnuson**  
 Janet Malone  
 Sarabeth and John Martin  
**Jan Mayo**  
 Libby and Murray McCabe  
**Meislik Family**  
 Abbie Milisci  
**Lori Miller**  
 Emmy and David Montanye  
 Betty Monzingo  
**Ellen and Matt Moran**

William G. Myers, Jr.  
 Gloria and Leif Nelson  
 Marilyn and Rick Nelson  
 Amy Johannes and Doug Newton  
 Terrie and Tom Nitopi  
 Sue and Brett Oemichen  
 Danielle and Sam Olsen  
 Pam and Randall Onstead  
 Claudine and T.C. Origitano  
 Missy and David Parrish  
 Val and Larry Parsons  
 Chantel and Joel Pemberton  
 Pam and Vin Perella  
**Sandy and Dan Perl**  
 Lisa Rigoli and Randy Phillips  
 Coco and Ross Pickert  
 Natasha and Jonathan Proto  
 Blanche Puffer  
**Quinn Family\***  
**Nikki and Doug Reed**  
 Reggie's Quick Lube  
 Victoria Reich  
**Sue and Hank Ricklefs**  
**Karen and Ron Rosenberg\***  
 Laura Reynolds and Walter Rowntree  
**Kim and George Ruhana**  
**Melinda Ryan**  
**Charlene Rygg**  
 Julie and Scott Sanderude  
 Sandy and Al Schellinger  
**Stacy Schlinger\***  
 Eric Schmidt and Deven Robinson

**Mark Schmidt**  
 Liz and Kevin Scholten  
 Jennifer and Tyler Seibert  
**Marie and Mike Shaw**  
 Marla and Van Shaw  
**Janna and Jamie Shennan\***  
 Austine and Vassilis Siomos  
 Nikki and Everit Sliter  
 Diana Strassmann and Jeff Smisek  
 Ashley and G. Stacy Smith  
 Jill and Kevin Smith  
 Caroline and Kip Smith  
 Linda Smith  
 Lucy Smith  
 Jennifer and Mark Smith  
 Claudia and Samuel Smith  
 Martha and William G. Smith  
**Carole and Roger Spragg\***  
 Lisa and Jim Stack  
 Jen and Gus Stein  
**Margy and Rob Stevens**  
 Kelly and Kim Stimpson  
 Lisa and Al Stinson  
**Nancy and David Stokes**  
 The Strong Fund  
**Jill and Jim Stroud**  
 Summit Beverage  
 Meg and Chris Temple  
 Edie Tinkler  
 Tracy Foundation  
 Heather and Scott Tucker  
 Priscilla and Garrett Turner

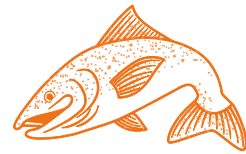
Toni and Jim Turner  
 Morgan and Jack Tyler  
 Michele and Mitchel Usibelli  
 Kristen and John VanDenburgh  
**Linda and Andy Viens**  
**Lori and Robb Voyles\***  
 Julie and Rob Waller  
**Dori and Bill Walton\***  
**Katie and Ben Ward**  
**Leslie and Mike Warning**  
**Boots and Alan Warrick\***  
**Carol Bibler and Jim Watson**  
**Byrdie and Ken Wessels\***  
**Ardy and Steve Whisler\***  
 Patty and Bryan Wick  
**Judy and David Williams**  
 Sue and Rick Williams  
**Mary and Hal Williamson**  
 Meggen and Brian Wilson  
**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, and names with an asterisk\* represent donors who have given for 10 years or more.





INSPIRATION OF



## GREAT FISH COMMUNITY CHALLENGE

The 10th annual Great Fish Community Challenge raised a record-breaking \$6,678,402 for 80 Flathead Valley nonprofits. The key to success of the Challenge is the Great Fish Match, made possible by our growing Circle of Giving and other donors who contribute. The Match inspires thousands of other donors to give. For many local nonprofits, the Challenge has transformed their organization by providing an efficient platform to build awareness, connect with new donors, and raise critical operating funds.

**\$35M**

RAISED SINCE INCEPTION IN 2015

**\$6,678,402**

RAISED IN THE 2024 CHALLENGE FOR 80 NONPROFITS

**\$1,128,598**

TOTAL 2024 MATCH FUND

**\$14,500**

MATCH ON FIRST \$25K RAISED BY EACH PARTICIPATING CHARITY

**30%**

INCREASE IN NUMBER OF DONORS IN 2024

**\$372,206**

WCF COSTS TO HOST THE 2024 CHALLENGE



## TIMELINE OF MAJOR MILESTONES

2015

The inaugural Great Fish Community Challenge raises \$1.1M for 33 nonprofits.

2019

The number of donors giving in the Challenge surpasses 2,000.

2021

The total raised breaks \$4M for the first time.

2024

A record 4,029 donors give in the 10th Great Fish Community Challenge.



Andrea Getts

## LAND TO HAND

### FROM GRASSROOTS TO GROUNDBREAKING

Land to Hand has participated in the Great Fish Community Challenge since 2015 and exemplifies what is possible when a nonprofit embraces the Challenge as a platform to scale fundraising, grow its team, and deepen its impact.

In 2015, Land to Hand (then Farm Hands Nourish the Flathead) raised \$4,855 from 53 donors through the Challenge. Fast forward to 2024, and Land to Hand raised an astounding \$211,000 from 424 donors!

This remarkable growth—over 4,200% in dollars raised—has powered a parallel evolution in the organization itself. What was once an all-volunteer effort has grown into a professional nonprofit with seven full-time and three part-time staff, allowing Land to Hand to broaden its reach and provide children and families with food security, education, and equitable access to fresh, local food.

The Backpack Program supplies nutritious, kid-friendly food to 400 Columbia Falls students every week, ensuring no child goes hungry over the weekend. And in 2025, Land to Hand will open a choice pantry specifically designed to give families with students in the Columbia Falls School District the dignity to choose the food that best fits their needs while promoting long-term food security.

Land to Hand's decade-long partnership with the Great Fish Community Challenge stands as a powerful example of how sustained, community-driven philanthropy can help a local nonprofit go from grassroots to groundbreaking.



*"The inaugural Great Fish Community Challenge exceeded our expectations and raised over \$1,126,000 for 32 local nonprofits.*

*We expect the Challenge to grow each year and become an essential part of our nonprofits' fundraising programs, increasing their capacity and cutting down on fundraising expenses."*

-David Dittman, Board Chair 2014-2016





# COMMUNITY GRANT PROGRAM

As the cornerstone of Whitefish Community Foundation's grant programs, the Community Grant Program was created in 2000 to have a broad impact on communities throughout the Flathead Valley. At the 2024 Community Grant Awards Celebration, the Foundation awarded \$385,800 in Community Grants to 64 nonprofit organizations representing projects and programs in Bigfork, Browning, Columbia Falls, Eureka, Evergreen, Kalispell, Libby, and Whitefish.



**\$3.1M**  
COMMUNITY GRANTS AWARDED SINCE 2000

**\$385,800**  
COMMUNITY GRANTS AWARDED IN 2024

**64**  
NUMBER OF NONPROFITS RECEIVING A COMMUNITY GRANT IN 2024

## TIMELINE OF MAJOR MILESTONES

2000

The Community Grant Program is born with \$7,000 awarded to 24 nonprofits. Whitefish Community Foundation board members make the first grants from their personal checkbooks.

2005

32 nonprofits serving the Whitefish area receive a Community Grant.

2009

The first annual Duck Derby raises \$25,000 for the Community Grant Program.

2010

Whitefish Community Foundation celebrates its 10th anniversary with \$100,000 in Community Grants to 46 nonprofits.

2014

The Circle of Giving is created to provide a reliable source of funding for all of Whitefish Community Foundation's grant programs.

2018

Whitefish Community Foundation's Board of Directors opens the Community Grant Program to all 501(c)(3) nonprofits serving the Flathead Valley.



2024

As the Circle of Giving grows, the impact of the Community Grant Program also grows. A record \$385,800 is awarded to 64 nonprofits.

Gravity Shots



The Duck Derby was a fun community-wide event that raised more than \$250,000 for Whitefish Community Foundation's grant programs from 2009 to 2014. Bill Howard was a tremendous force behind the success of the annual event and earned the Golden Duck Award on three occasions for selling the most ducks.



## 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.

### 2024 MAJOR COMMUNITY PROJECT GRANTS

**\$979,000**  
AWARDED FROM  
2011-2024

**\$125,000**  
AWARDED IN 2024

#### **\$25,000 AWARDED TO NORTHWEST MONTANA COMMUNITY LAND TRUST**

To secure four permanently affordable homes for families in the Trailview neighborhood in Whitefish

#### **\$50,000 AWARDED TO IMAGINEIF LIBRARY FOUNDATION**

To bring a new public library to the community of Bigfork

#### **\$50,000 AWARDED TO NORTH VALLEY MUSIC SCHOOL**

To build a new campus in Whitefish. Several Donor Advised Fund holders joined us for a total impact of \$130,000.



## TIMELINE OF MAJOR MILESTONES

2011

The Major Community Project Grant Program is born with \$20,000 awarded for the Whitefish High School gymnasium renovation project.

2012

Russ and Mary Jane Street's bequest funds seven \$25,000 Major Community Project Grants.

2013

Shepherd's Hand Free Clinic receives a grant to support the dental program.

2014

Whitefish Legacy Partners receives a grant to permanently protect 1,500 acres through the Beaver Lakes Conservation Easement.

2020

Three Rivers EMS receives a grant to replace their ambulance cardiac monitor.

2021

North Valley Food Bank receives a grant to expand warehouse space and create an onsite commercial kitchen.

2022

Land to Hand receives a grant to relocate a building next to the Wildcat Garden at Columbia Falls Junior High School to serve as the ideal place to offer educational programs for children and provide fresh local food to families.

2023

Flathead Audubon Society receives a grant to permanently protect 442-acres along the Flathead River at the Owen Sowerwine Natural Area.

2025

Whitefish Community Foundation announces \$500,000 in grants to be awarded in celebration of the Foundation's 25th anniversary.



The Montana Veterans Home in Columbia Falls received a Major Community Project Grant in 2018 to purchase a new wheelchair-accessible bus for residents.



## EMERGENCY RESPONSE GRANT PROGRAM

Whitefish Community Foundation's Community Emergency Response Grant Program provides flexible resources for nonprofits facing an unexpected emergency. These grants may be deployed rapidly to support nonprofits during a recognized emergency or disaster in the Flathead Valley or they may be utilized to fund projects or repairs that must be addressed immediately in order to keep a local nonprofit operating.

### 2024 EMERGENCY RESPONSE GRANTS

#### \$17,000 AWARDED TO FAST BLACKFEET

To repair their O'yō'p' On Wheels van and purchase a used refrigerated truck, allowing them to resume mobile pantry service to eight outlying communities on the Blackfeet Reservation

#### \$2,500 AWARDED TO WHITEFISH COMMUNITY SCHOOL

To replace the preschool's failing air conditioning unit in the middle of summer

#### \$7,418 AWARDED TO CAMAS DAY SCHOOL

To replace the preschool's unsafe and inefficient windows

#### \$45,000 AWARDED TO NEIGHBORWORKS MONTANA

To help displaced residents of the Spring Creek Mobile Home Park in Evergreen find new housing after they received mass eviction notices

**\$426,723**  
AWARDED SINCE 2009

**\$71,918**  
AWARDED IN 2024

RESPONSIVENESS OF

## TIMELINE OF MAJOR MILESTONES

2020

Twenty-six Emergency Response Grants totaling \$229,900 are awarded to Flathead Valley nonprofits to address challenges brought on by the Covid-19 pandemic.

2022

Samaritan House receives a grant to deploy a temporary shelter for individuals and families displaced by the closure of the Fairbridge Inn & Suites in Kalispell.

2023

Flathead Warming Center receives a grant to replace the shelter's failing roof.

North Valley Food Bank receives a grant to help replace their refrigerated food truck.

*"It was truly inspiring to see our community rally together so quickly to support the residents of Spring Creek in Evergreen. Thanks to the generosity of local donors and Whitefish Community Foundation, we were able to provide critical relocation assistance to 26 low-income families—ensuring they remained housed in one of the most challenging housing markets in the nation. For many, this support not only prevented displacement, but also opened the door to safer, more stable housing opportunities."*

-Danielle Maiden,  
NeighborWorks Montana Cooperative  
Housing Director



EMPOWERING OF

## MICRO GRANT PROGRAM

Whitefish Community Foundation's Micro Grant Program was designed to provide a low-barrier path for small and recently established nonprofits to apply for up to \$1,000 in funding. For many small nonprofits, receiving a Micro Grant is the first step in developing a relationship with the Foundation. In 2024, these 12 Flathead Valley nonprofits received a \$1,000 Micro Grant:

- **Columbia Falls High School Speech and Debate Team**  
To offset travel costs for students competing at the National Speech and Debate Tournament
- **The LOT Project**  
To assemble Survival Kits, including high-protein food, thermal blankets, and first-aid items, for homeless veterans to be distributed at the North West Montana Veterans Stand Down
- **Kalispell School District**  
To send students to Academic WorldQuest at the University of Montana
- **Whitefish Band Boosters**  
To support educational enrichment for Whitefish middle and high school band programs
- **Montana State Parks Foundation**  
To replace the swim dock at Les Mason State Park
- **Authors of the Flathead**  
To build an interactive website
- **Bear Grass Performing Arts**  
To purchase sheet music for the Flathead Valley Youth Chorus
- **Whitefish School District**  
To purchase 100 uniforms for the Middle School Cross Country Team
- **Rainbow's End Daycare**  
To purchase art and educational enrichment supplies
- **West Shore Food Bank**  
To purchase and distribute 100 holiday food boxes to families in need
- **Driving Hope**  
To refurbish a tow truck for salvaging donated vehicles
- **Montana Alpine Race School**  
To expand alpine ski racing training through coaching support





## 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 homeless or at risk of becoming homeless. In response, Whitefish Community Foundation created the Kids Fund to support programs in the areas of housing, health and mental wellness, safety, food access, and education that mitigate the challenges faced by these youth and their families.



**2024  
KIDS FUND  
GRANTS**

**\$532,846**  
KIDS FUND GRANTS  
FROM 2020-2024

**\$111,700**  
KIDS FUND GRANTS  
IN 2024

### **\$50,000 AWARDED TO BIGFORK ACES**

To support the creation of an afterschool program for middle school students in Bigfork

### **\$24,000 AWARDED TO FLATHEAD YOUTH HOME**

To support a Youth Advocate staff position that connects each resident to resources and supports these youth post discharge, setting them up for success into adulthood

### **\$7,700 AWARDED TO LAND TO HAND**

To expand and upgrade a food, clothing and resource pantry for students at Columbia Falls High School

### **\$30,000 AWARDED**

### **TO CENTER FOR RESTORATIVE YOUTH JUSTICE**

To support a Youth Program Director & School Liaison to work within local school districts, offering teens meaningful accountability opportunities outside of the juvenile justice system

### **KIDS FUND GRANT RECIPIENTS FROM 2020-2024**

- Bigfork ACES
- Boys & Girls Club of Glacier Country
- CASA for Kids
- Center for Restorative Youth Justice
- Child Bridge
- Flathead Youth Home
- Land to Hand
- Nate Chute Foundation

The Kids Fund supports programs in the areas of housing, health and mental wellness, safety, food access, and education that mitigate challenges and prevent youth from becoming homeless.

## TIMELINE OF MAJOR MILESTONES

2019

Whitefish Community Foundation hosts a community forum to address youth homelessness.

2020

In response to a match challenge from the Lesar Family Foundation, Whitefish Community Foundation creates the Kids Fund.

2021

Boys & Girls Club of Glacier Country creates a new afterschool program for youth in Evergreen, thanks to a multi-year grant from the Kids Fund.

2022

CASA for Kids receives a multi-year Kids Fund Grant to support a Youth Case Manager who provides targeted case management and peer-to-peer support activities for foster youth and alumni age 14-23.

2024

Kids Fund grants surpass \$530,000 to 8 Flathead Valley nonprofits.



## SHERRY & DAVE LESAR

CIRCLE OF GIVING MEMBERS  
DONOR ADVISED FUND HOLDERS

The Flathead Valley is known for its beauty, year-round recreation, and friendly people. However, there is another aspect to this special valley that many locals, seasonal residents, and visitors do not know about: youth homelessness.

Youth homelessness is not just about lacking a safe and stable place to live. It is a serious problem that affects every aspect of a child's life. It involves food insecurity, physical and mental health issues, sporadic school attendance, and academic struggles. It's also about 'aging out' of the foster home system at 18 and suddenly having no safety net.

The Kids Fund grew out of an informational event sponsored by Whitefish Community Foundation in 2019 where several local nonprofit organizations that serve at-risk children described their roles, shared their daily challenges, and answered questions. A young woman who had been able to find a way out of homelessness with the help of one of these nonprofits spoke about her journey.

I have served on the board of Whitefish Community Foundation for many years, and I knew about the hard work of these organizations, but the information and stories they shared that night shocked even me.

We left the event feeling there had to be something more that could be done to help local nonprofits better serve these children.

Dave and I determined that Whitefish Community Foundation was the right vehicle to accomplish our goal. Knowing that the Foundation thoroughly vets all nonprofits before granting any funding, we felt secure that our contributions would go to worthy organizations where every dollar would make a difference. We met with Linda Engh-Grady and decided to create a new fund specifically to help nonprofits working to impact youth homelessness and hunger. We chose to make our gift to this new fund a matching opportunity for donors.

The Kids Fund connects donors with local nonprofits that are working to better the lives of at-risk children through sustainable programs. Kids Fund grants focus on the areas of homelessness, health, education, and safety. The fund's mission is to help qualifying nonprofits create sustainable programs that really 'move the needle' and help them get to a deeper level of service.

Since its inception in 2019, and through the very generous contributions of our matching donors, the Kids Fund has made transformational impact. We are very proud of the positive change that the Kids Fund is making in children's lives.



*"I have served on the board of Whitefish Community Foundation for many years, and I knew about the hard work of these organizations, but the information and stories they shared that night shocked even me."*



## DONOR ADVISED FUNDS

### WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund (DAF) is a charitable giving account designed to help families and individuals GIVE, GROW, and GRANT to support their favorite nonprofits.

### HOW DOES A DONOR ADVISED FUND WORK?



#### GIVE

Donors establish a DAF through a minimum gift of \$5,000 and receive an immediate tax deduction.



#### GROW

Whitefish Community Foundation works with expert advisors to invest the fund based on the donor's giving timeline. Additional gifts to the DAF can be made at any time.



#### GRANT

Donors utilize Whitefish Community Foundation's online portal to request grants to any 501(c)(3) charity in the United States.

### WHY OPEN A DONOR ADVISED FUND AT WHITEFISH COMMUNITY FOUNDATION?

Supporting your favorite nonprofits is quick and easy through Whitefish Community Foundation's online portal, where you can research charities, recommend grants, view your granting history, and download monthly statements. Whitefish Community Foundation can share our expertise on local nonprofits. Our fees match or beat corporate DAFs and best of all, they stay local and directly support our mission. Investment returns are in the top 10% of community foundations nationally.

OF GIVING

**\$42.6M**  
AWARDED THROUGH  
DONOR ADVISED  
FUND PROGRAM  
SINCE 2000

**\$5.1M**  
AWARDED IN 2024  
A 13.5% INCREASE  
OVER 2023

**75**  
DONOR ADVISED  
FUNDS IN 2024



## TERRY CHUTE & JANE KOLLMAYER

DONOR ADVISED FUND HOLDERS,  
CIRCLE OF GIVING MEMBERS,  
METC DONORS

Terry Chute and Jane Kollmeyer founded the Nate Chute Foundation in 1999 to promote mental wellness and reduce suicide. The nonprofit organization received its first grant from Whitefish Community Foundation in 2003 to provide mental health services to children in the Whitefish School District not covered by insurance or Medicaid. Since then, Nate Chute Foundation has proven itself as a leader in delivering impactful preventative services and educational programs in schools and workplaces throughout the Flathead Valley. Whitefish Community Foundation is proud to support the work of Nate Chute Foundation through our various grant programs, including the Great Fish Community Challenge, Community Grants, and Kids Fund.



Since you applied for that very first grant from Whitefish Community Foundation in 2003, how has your engagement with the Foundation evolved?

*When Jane's mother passed, we used some of her inheritance to open a Donor Advised Fund at Whitefish Community Foundation. Over the years we have used our Donor Advised Fund to direct charitable contributions to nonprofit organizations throughout Montana. We subsequently joined the Circle of Giving, established a Legacy Fund, and worked with Whitefish Community Foundation to establish an endowment for the Nate Chute Foundation utilizing the Montana Endowment Tax Credit.*

**As a nonprofit founder and leader, what do you value most about working with Whitefish Community Foundation?**

*First and foremost, we appreciate Whitefish Community Foundation's dedication to helping our nonprofit be the best that we can be. Many local nonprofits would not exist today if it were not for financial support, mentoring, and training that Whitefish Community Foundation provides. Both individual nonprofits and the entire nonprofit community are stronger and more effective due to the leadership and support provided by Whitefish Community Foundation.*

**As a donor, what do you value most about working with Whitefish Community Foundation?**

*Whitefish Community Foundation makes it easy and rewarding for us to support local nonprofits in several ways. We appreciate the relationship we have with Whitefish Community Foundation—the staff knows us personally and helps us to achieve our goals for charitable giving, both now and in the future. Each of Whitefish Community Foundation's giving programs is cost effective and uncomplicated.*



*"First and foremost, we appreciate Whitefish Community Foundation's dedication to helping our nonprofit be the best that we can be."*



## LEGACY SOCIETY

The Legacy Society is a special group of donors who share a vision of providing for the needs of future generations through planned giving. Whitefish Community Foundation specializes in working with donors to create lasting impact for our community.

Legacy Society donors can take advantage of numerous tools to leave a legacy, including a bequest in their will or trust or taking advantage of the Montana Endowment Tax Credit with a deferred charitable gift annuity. A Legacy Fund is a charitable tool that allows donors to make annual distributions to their favorite charities after they are gone, and Whitefish Community Foundation ensures the funds are prudently invested and granted out according to the donor's wishes.

**Whitefish Community Foundation**  
is here to help you leave a  
**LASTING LEGACY**  
according to your wishes.



LEGACIES OF



### JIM & LISA STACK

LEGACY SOCIETY  
DONOR ADVISED FUND HOLDERS  
CIRCLE OF GIVING MEMBERS

We've built our lives, our home, and our business in Whitefish and the Flathead Valley, so giving back to our cherished community has never been more important to us. Whitefish Community Foundation has been at the core of our philanthropic efforts—from starting a Donor Advised Fund to more recently establishing a Legacy Endowment Fund, rather than creating a private foundation. We worked closely with the Foundation team to structure the Legacy Fund—and its future granting—around our values and wishes. Their commitment to fiscal responsibility, high standards, and focus on long-term community impact gave us complete confidence.

## THANK YOU, LEGACY SOCIETY MEMBERS

- Anonymous (8)
  - Carol and Richard Atkinson
  - Julie and Summerfield Baldrige
  - Mary VanBuskirk and Roger Barber
  - Betsy and Bill Bayne
  - Dorothy and Luther Campbell
  - Kris and Tom Carlson
  - Jane Kollmeyer and Terry Chute
  - Anne and John Collins
  - Lynnette and Mark Donaldson
  - Daniel Gagen
  - Tanya and Judah Gersh
  - Linda Engh-Grady and Dave Grady
  - Cynthia Granmo
  - Dana Hanna
  - Connie and Jake Heckathorn\*
  - Joaquenia and Klaus Heinrich
  - Thomas A. Hughes, III
  - Barbara and Mike Jenson
  - Ann and Paul Jeremiassen
  - Herbert Kameon Trust\*
  - John Kramer Jr.
  - Janice and Paul McCann
  - Meislik Family
  - Michael H. Meszaros\*
  - William G. Myers, Jr.
  - Sue and Brett Oemichen
  - Blake Reese Memorial Endowment
  - Susan and Henry Ricklefs
  - Dean A. Robbins (Wiley Homestead)
  - SBB Fund
  - M & S Schmidt Fund
  - Doris Schumm\*
  - Janna and Jamie Shennan
  - Lisa and Jim Stack
  - Sharon Stevens
  - Dave Stewart\*
  - Mary Jane and Russ Street\*
  - Jordan and Travis Taylor
  - Virginia Weldon\*
  - Susan and John Witt
- \* Deceased



EDUCATION OF



## 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
- Kiita Foundation Scholarship
- Montana Coffee Traders Scholarship

**\$118,500**

AWARDED SINCE 2015

**13**

STUDENTS RECEIVED  
SCHOLARSHIPS IN 2024





## MONTANA ENDOWMENT TAX CREDIT

The **MONTANA ENDOWMENT TAX CREDIT (METC)** helps build nonprofit endowment funds by allowing donors to pay less in Montana state income taxes when they make a planned gift to a qualified Montana charitable endowment, such as any of the 46 endowment funds held at Whitefish Community Foundation.

In 2024, 21 donors saved approximately \$400,000 in Montana state income taxes by investing \$1M in nonprofit endowment funds held by Whitefish Community Foundation. Since inception in 2012, a total of \$4.2M has been raised for nonprofit endowments through the METC program at Whitefish Community Foundation.

	FOR INDIVIDUALS	FOR BUSINESSES
<b>TYPE OF GIFT</b>	Planned Gift (Deferred Gift Annuity) of cash or appreciated securities. <i>Minimum gift size \$10,000.</i>	Direct gift of cash or appreciated securities. <i>No minimum gift size.</i>
<b>AMOUNT OF MONTANA ENDOWMENT TAX CREDIT</b>	40% of the initial gift, up to max credit of \$15,000 per taxpayer (\$30,000 for joint filers). <i>The remaining gift amount provides a federal tax deduction.</i>	20% of gift amount, up to max credit of \$15,000. <i>The remaining gift amount provides a federal tax deduction.</i>

SUSTAINABILITY OF

**\$1,002,606**  
TAX CREDIT GIFTS  
RECEIVED IN 2024

**119**  
METC GIFTS  
RECEIVED SINCE 2012

*"The Montana Endowment Tax Credit for us is more of a tool than an incentive. We developed our giving strategy to focus on kids and giving them a voice around the issues of youth homelessness and foster care. We have used the tax credit structure to create a long-term sustainable gift for an organization that is doing great work on behalf of local children."*

-Jeff and Teri Allen



## 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 reliable revenue source and builds long-term sustainability for the organization.

### NONPROFIT ENDOWMENTS HELD BY WCF:

- Abbie Shelter Endowment
- Alpine Theatre Project Endowment
- Back Country Horsemen Endowment
- Bob Marshall Wilderness Fdn Endowment
- CASA for Kids Endowment
- Center for Restorative Youth Justice Endowment
- Child Bridge Endowment
- DREAM Adaptive Recreation Endowment
- First Presbyterian Church Endowment
- Flathead Audubon Society Endowment
- Flathead Food Bank Endowment
- Flathead Land Trust Endowment
- Flathead Shelter Friends Endowment
- Foy's To Blacktail Trail Maintenance Endowment
- Glacier National Park Conservancy Endowment
- Glacier Nordic Club Endowment
- Glacier Symphony and Chorale Endowment
- Habitat for Humanity Endowment
- Hockaday Museum of Art Endowment
- Human Therapy on Horseback Endowment
- Humane Society of NW MT Endowment
- Immanuel Foundation Endowment
- Kalispell Education Foundation Endowment
- Land to Hand Endowment

- Logan Health Foundation-Whitefish Hospital Endowment
- Montana History & Civics Education Endowment
- Nate Chute Foundation Endowment
- Nonprofit Development Program Endowment
- North Valley Food Bank Endowment
- North Valley Music School Endowment
- North Valley Music School Youth Scholarship Endowment
- Patrol Fund Endowment
- Shepherd's Hand Endowment
- Smith Fields Endowment
- Somers Beach State Park Endowment
- Sparrow's Nest of NW MT Endowment
- Stumptown Art Studio Endowment
- Stumptown Historical Society Endowment
- The WAVE Endowment
- Whitefish Community Foundation Endowment
- Whitefish Community Library Endowment
- Whitefish Dog Park Endowment
- Whitefish Education Foundation Endowment
- Whitefish Library Association Endowment
- Whitefish Performing Arts Center Endowment
- Whitefish Theatre Company Endowment
- Whitefish Trail Endowment

SUSTAINABILITY OF

**\$23.5M**  
TOTAL ENDOWED  
ASSETS

**\$4.1M**  
DISTRIBUTIONS TO  
NONPROFITS  
SINCE 2014

**\$559,327**  
ENDOWMENT  
DISTRIBUTIONS  
IN 2024

**46**  
NUMBER OF  
ENDOWMENTS  
HELD BY WCF



*"We are incredibly grateful for the generous donors who contribute to our endowment fund at Whitefish Community Foundation. Their support helps secure the future of CASA for Kids by meeting our immediate needs and enabling us to seize opportunities. Thanks to the expert financial management of the Foundation, our annual distribution is predictable and growing, allowing us to impact even more kids today while also planning for a bright future."*

-Cindy Basnett, Executive Director of CASA for Kids



## 2024 SPECIAL AWARD WINNERS

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

### GREAT FISH AWARD \$10,000

The Great Fish Award is given annually to an organization that demonstrates tremendous leadership and dedication toward advancing their mission and impacting the critical needs in local communities. **Samaritan House** received the 2024 Great Fish Award for the organization's work to provide basic needs and shelter to unhoused community members while fostering self-respect and human dignity.

### LINDA ENGH-GRADY AWARD FOR NONPROFIT EXCELLENCE \$10,000

**Whitefish Legacy Partners** Executive Director Heidi Van Everen received the inaugural Linda Engh-Grady Award for Nonprofit Excellence in recognition of her efforts to develop the Whitefish Trail system and place the surrounding landscapes into permanent conservation. The accompanying grant supported the Smith Lake Legacy project.

### JEAN AND BILL HOWARD MEMORIAL AWARD \$5,000

**Flathead Youth Home** received the Jean and Bill Howard Memorial Award and an accompanying \$5,000 grant for the organization's commitment to helping youth to feel safe, have a sense of belonging, and find a place to call home.

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

**Whitefish Winter Carnival** received the Russ and Mary Jane Street Community Service Award and an accompanying \$2,500 grant for providing over 60 years of festivities during the month of February.

### DORIS SCHUMM COMMUNITY SPIRIT AWARD \$2,500

**Foy's to Blacktail Trails** received the Doris Schumm Community Spirit Award and an accompanying \$2,500 grant for the organization's work to conserve local lands and create a multi-use trail system connecting Blacktail Mountain, Herron Park, and the greater Flathead Valley.

### CONNIE HECKATHORN CHEERS FOR VOLUNTEERS AWARD \$2,500

**Kyle Waterman** was recognized for going above and beyond for Western Montana Mental Health Center, Samaritan House, Flathead County Suicide Task Force, Kalispell Daybreak Rotary, and other organizations. Kyle directed the accompanying \$2,500 grant to Samaritan House.

**Bill and Sarah Dakin** were recognized as a couple for their significant contributions of service to Gateway to Glacier Trails, Northwest Montana History Museum, Flathead Land Trust, Columbia Falls Academic Foundation, as well as city and county planning boards. Bill and Sarah directed the accompanying \$2,500 grant to the Flathead Warming Center.

### FOUNDERS LEADERSHIP AWARD \$2,500

Whitefish resident **John Collins** received the Founders Leadership Award for his leadership in philanthropy, board service, and conservation. A \$2,500 grant accompanied the award, which John directed to FAST Blackfeet, a nonprofit organization dedicated to improving food security, providing nutrition education, and reclaiming and building food sovereignty within the Blackfeet Nation.

### CORPORATE CITIZENSHIP AWARD \$2,500

**KGEZ Radio** received the Corporate Citizenship Award for their decades-long support of the Flathead Valley nonprofit community. A \$2,500 grant accompanied the award, which KGEZ directed to the Kalispell Education Foundation and their work to support Kalispell Public Schools.



EXCELLENCE OF



13  
NUMBER OF  
LEARNING  
OPPORTUNITIES  
IN 2024

100+  
NONPROFITS  
ATTENDED IN 2024

24  
NUMBER OF NONPROFITS  
AWARDED A CAPACITY  
BUILDING GRANT  
SINCE 2021

## NONPROFIT DEVELOPMENT PROGRAM (NpDP)

Whitefish Community Foundation offers free professional development, capacity building, and networking opportunities for local nonprofit staff and board members. Our Nonprofit Development Program has helped organizations improve their fiscal responsibility, fundraising, outreach, and governance. Nonprofits can also apply for a \$2,000 Capacity Building Grant to purchase donor database or accounting software or to develop a strategic plan.

### 2024 NONPROFIT WORKSHOPS:

- Guarding the Mission: Duties Every Board Must Uphold
- What Nonprofits Need to Know about the Montana Endowment Tax Credit
- HR Do's and Don'ts
- Planning a Successful Capital Campaign
- Succession with Intention
- Grow Your Gifts
- Nonprofit Managing Fundamentals
- Your Insurance Questions Answered
- Building Your Generosity Framework



My Glacier Village has taken advantage of several NpDP offerings to grow steadily since inception in 2020. Their team of volunteers attended governance, fundraising, and grant writing workshops in the early days, and used this knowledge to build a solid foundation and hire their first staff member in 2022. In 2024, the organization participated in the Great Fish Community Challenge for the first time, and they received a \$2,000 NpDP Capacity Building Grant to engage a consultant and develop a strategic plan.

*"Working through this process together with Whitefish Community Foundation was amazing! We were able to prioritize goals, assign tasks, and develop timelines to complete a strategic plan. For the first time, we have a roadmap!"*

-Kathy Cozad, My Glacier Village Board Chair



## BY THE NUMBERS

### COMPOSITION OF ASSETS

#### 2024 YEAR END

**2,044**  
NUMBER OF  
GRANTS AWARDED

**\$7,384**  
AVERAGE  
GRANT AMOUNT

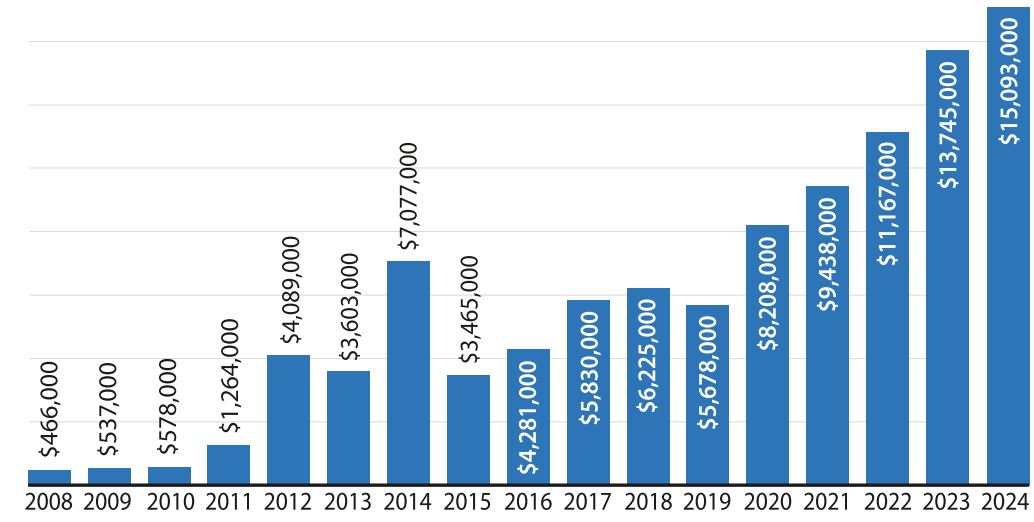
**353**  
NUMBER OF  
NONPROFIT  
RECIPIENTS

**\$42,755**  
AVERAGE PER NONPROFIT

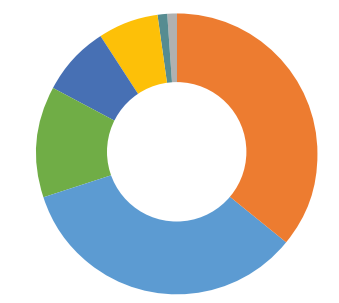
**As of December 31** ..... **2024** ..... **2023**

Total Assets	\$67,617,402	\$61,445,231
Total Contributions	\$17,012,895	\$17,925,000
Total Grant Distributions	\$15,092,559	\$13,745,000

#### GROWTH IN GRANTING

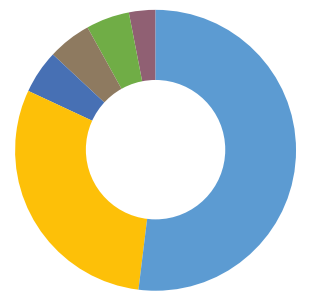


#### GRANT DISTRIBUTIONS BY FUND TYPE



- Great Fish Funds, 36%
- Donor Advised Funds, 34%
- WCF Grant Programs, 13%
- Designated Funds, 8%
- Endowment Funds, 7%
- Agency Funds, 1%
- Scholarships, 1%

#### TOTAL ASSETS BY FUND TYPE



- Advised, 52%
- Endowed, 30%
- Designated, 5%
- Annuity, 5%
- WCF Grants, 5%
- Operating, 3%

## FINANCIAL STEWARDSHIP

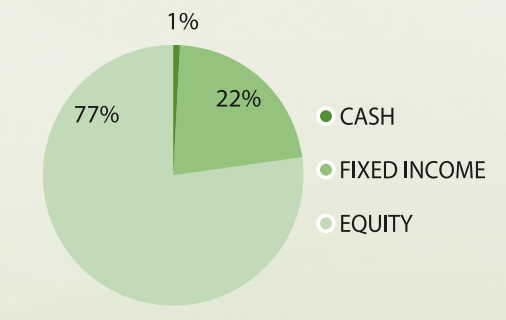
As part of our mission to foster philanthropy, build endowments, and help donors and nonprofits benefit our communities, Whitefish Community Foundation is wholly committed to being good stewards of the donor funds entrusted to us. Prudent asset management supports strong grant programs capable of meeting community needs long into the future. Our financially savvy Investment Committee and staff work closely with nationally acclaimed Mason Investment Advisory Services to ensure that all assets entrusted to us are invested in a diverse portfolio designed to maximize returns while minimizing risk and volatility.

### INVESTMENT RETURNS (ANNUALIZED & NET OF FEES)

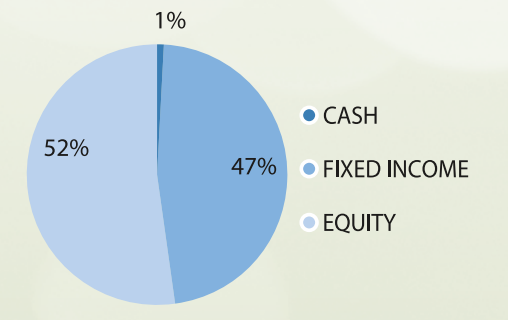
Investment returns are ending December 31, 2024

	1-YR	3-YR	5-YR
Long-Term Growth	9.16%	2.98%	7.47%
Balanced	6.70%	1.68%	5.19%
Capital Preservation	4.86%	3.44%	2.33%

#### LONG-TERM GROWTH ALLOCATION



#### BALANCED POOL ALLOCATION



#### INVESTMENT COMMITTEE

- G. Stacy Smith, Chair
- John Collins
- Brenden Craig
- Greg Garrison
- Hank Ricklefs
- Jamie Shennan
- Ardy Whisler

#### FINANCIAL MANAGERS DISCLOSURE

- Investment Manager:** Mason Investment Advisory Services
- Custodian:** Pershing, LLC
- 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](http://whitefishcommunityfoundation.org)

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



# THANK YOU, 2024 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:

### Barasch, Stephen and Charlene\*

Barber, Roger and Mary VanBuskirk\*  
Barham, Michael and Kristi  
**Barker, Rod and Marianne\***  
Bartoskewitz, Rick and Trish  
Batts, Joe and Lana  
Bax, Gayle

### Bay, Mogens and Cindy\*

Bayne Foundation  
**Bayne, Bill and Betsy\***  
Beale, Paul and Amy\*  
Beightol, Jim and Dee  
Beizer, Jon and Tierney  
Bell, Terry and Linda\*

### Bennett, Bob and Caryl\*

Bergum, Barbara  
Biele, Alec and Kathy Friday  
Billuni, Rick and Bonnie\*

### Bindley, Bill and Mary Ann\*

**Bishop, Rita\***  
Blair, Ed and Kelly Ingham  
Blair, Bob and JoBeth  
Bloom, Todd and Lannette  
Blumhardt, David and Mary Beth

### BNSF Railway Foundation\*

Boatwright, Carlene  
Boody, Bruce  
Boorman, Barbara  
Bosa, Lauren

### Boyer, Dick and Sandy\*

Boyer, Matt and Gretchen  
Braig, Robert and Beverly  
Braig, Rob and Samantha  
Brandt, Ron and Marilyn  
Brien, Katie

### Brigham, Bud and Anne

Brister, Matt and Tara  
Broussard Charitable Foundation\*  
Brown, Mark and Carissa

Brown, Bob and Sue  
Bruce, Larry and Molly  
Bruggeman, Denise  
Budín, Ethan and Karen  
Bulkley, Brad and Ann  
Bullock, David and Janice  
Burris, Todd and Lindsey  
Burton, Andrew  
Burton, Paul\*

### Butcher, Peter and Jean

**Campbell, Eileen Bocci\***  
**Campbell, Luther and Dorothy\***  
Campbell, Thomas  
Candler, Kathy

### Carlson, Tom and Kris\*

Carstens, James and Sue  
Carter, Jake and Sonia  
**Case, James and Janice\***  
Case, John and Patricia\*

### Casey, Maureen\*

**Casteel, Bob and Patsy\***  
Castor, Rich  
Cha, Juanita Rose  
Chaisson, Megan

### Chaney, John\*

Chauner, Linda  
Chisholm, Dean  
Chrest Foundation  
Christopher, Bill and Heather

### Church of the Cross\*

**Chute, Terry and Jane Kollmeyer\***  
Clamage, Eric and Rachel Mogul  
Clark, Brian\*

### Clearwater, Ron and Lauren Sparks

Cloutier, Jenny\*  
Coburn, Braydon and Nadine  
Coghlan, Alicia  
Cohen, Connie

### Colby, Michael and Dyan

Coleman, Stewart and Liz

### Coles, Jim and C. K.\*

Collier, Cary and Kim  
**Collins, John and Anne\***  
Connolly, Shannon  
Coolidge, Del and Linda

### Cooney, Ned and Cathy

**Cornutt, Linda\***  
Corson, Tim and Deidre\*  
Covey, Michael and Stacy  
**Coyne, Wendy\***

### Cozad, Karl and Kathy\*

Craig, Brenden and Karyn  
Craven, Kurt and Billie Thomas  
Crocker, Dow and Felice\*

### Cross, Gordon and Katherine\*

Cubberley, Lindy\*  
Cummings, John and Lois  
Curtis, Katherine\*  
Dahle, Megan

### Dahlman, Tanner

Dakin, Bill and Sarah  
Dale, Larry and Beverly\*  
Damici, Dennis  
Danczyk, Gary and Annell\*

### Daniher, J.D. and Nicci

Davidson Construction, Inc.  
Davis, Alan and Frances  
Davis, Larry and Roberta Myers  
Davis, Margaret

### Deadman, Davis and Stephanie

DeBartolo, Eddie and Candy\*  
Dennis & Phyllis Washington Fdn\*  
Diacio, Michael

### Dittman, David and Frances\*

Divoky, Terry and Dennis  
Dominguez, Andres and Lynn  
Donaldson, Mark and Lynnette\*

### Donovan, Tama

Doughman, Bryan and Jenny

Doyle, Michael and Myra  
Ducsak, Thomas  
Dunlevie, Bruce and Elizabeth  
Dunlop, Blake and Nora\*  
Dworman, Ross and Kate\*  
Dykstra, Ben and Lynn\*  
Eisenzimer, Kelsey

Ellingson, Brittan and Lauren  
Ennis, Bruce and Maggie Davis  
Ennis, Felicia  
Erflé, John and Linda

### Erickson, Bart and Carole

Erickson, Leif and Aubrey  
Ericson, Dave and Sarah\*  
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## IN MEMORIAM

**TOM QUINN (1945-2025)  
 Board member 2013-2016**

Whitefish Community Foundation and nonprofits throughout the Flathead Valley lost a generous, kind, and thoughtful friend earlier this year with the passing of Tom Quinn. When Tom and Teresa Quinn moved to Whitefish in 2007, they made getting involved with the community a top priority. They connected with Whitefish Community Foundation, where Tom would serve several years on the Board of Directors and the Grants Committee. In 2019 he was named an emeritus board member in recognition of his distinguished service and contributions.

At Whitefish Community Foundation’s annual Community Grant Awards Celebration in April, Caeli Quinn presented the Tom Quinn Memorial Award and an accompanying \$25,000 gift to Whitefish Education Foundation to replace musical instruments at the middle and high schools. When presenting the award, Caeli shared this tribute to her father on behalf of their family:

“Many of you might remember my dad. Whether tracing back to his upbringing on horseback on a Nebraska farm or during his busy career as a doctor in Florida, what was always evident was his kindness, his peaceful nature, his generosity, and that ever-present smile. He approached everything he did with quiet purpose.

And when my parents chose Whitefish as their forever home back in 2007, Tom and Teresa didn’t waste a moment. They immediately connected with Whitefish Community Foundation, eager to learn how they could contribute meaningfully to this valley they already loved.

Tom joined the board and the Grants Committee, and he dove deep into understanding the rich tapestry of our local nonprofits, becoming a dedicated advocate and donor. As some former board members have reminded me, whenever there was a question of the best path forward, Dad’s guiding thought was often, ‘How can we find a way to give more?’

His passions were clear—wildlife, conservation, and supporting those facing the greatest challenges in our world, especially women and children. But what you might not know was his passion for the arts. I grew up with a steady soundtrack of Broadway, jazz, and classical music – and yes, I’ll admit to sleeping through more than a few operas as a child! The arts were a joyful presence in our lives.

So, when Dad passed away, and we learned about a special project through the Whitefish Education Foundation, it felt like the perfect way to honor his memory—combining his love for this community with his love for the arts.

It is such a magical thing that our local schools offer every child the chance—in fact, require them—to experience playing an instrument. That’s not standard across the country, and we know the profound, proven impact musical education has: boosting academic outcomes, improving literacy, and encouraging graduation.

*“How can we find a way to give more?”*

These current instruments have faithfully served generations for nearly 70 years. Our family wants to be part of ensuring that for the next 70 years, vibrant musical education thrives in this community. It is with incredible joy tonight that, on behalf of our family and Tom’s greatest love of all, Teresa, that we are donating \$25,000 to jumpstart the campaign to replace the orchestra instruments right here at the Whitefish schools.

Thank you to the Whitefish Education Foundation for leading this important charge, and thank you to the incredible music teachers who bring the gift of music to our students every single day. It’s an honor to support your work in Tom’s name.”



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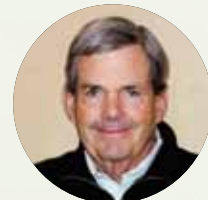
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