

2016

**Whitefish Community Foundation
Annual Report to the Community**

Your
**WHITEFISH
COMMUNITY FOUNDATION**
Giving Together Creates Impact



GIVING TOGETHER

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



Whitefish Pilot Heidi Desch

2016 EXTRA MILE DAY PROCLAMATION

Presented to Whitefish Community Foundation by the City of Whitefish with a proclamation by Mayor John Muhlfeld





GIVING TOGETHER



Gravity Shots

CONTENTS



From the Chairman

4



Community Grant Report

5 - 6



Circle of Giving

7 - 8



Great Fish Community Challenge

9 - 13



Special Awards

19 - 22



Investment & Financial Summary

23 - 25



Legacy Society

26



Donor Recognition

27 - 28



1 Mission



16-18 Scholarship & Endowment Funds



28 In Honor and In Memory



14 Patron Pass Programs



24 Donor Advised Funds



29-30 Leadership

What is Whitefish Community Foundation?



From first-time donors to seasoned philanthropists, businesses, and endowments; from simple gifts to complex donations, and everything in between, Whitefish Community Foundation is here to highlight philanthropy in its many powerful forms.



From the Chairman of the Board

I'm happy to report to you a very successful year for your community foundation. Let me highlight several significant events from 2016.

Our Summer Art Social in partnership with the Iron Horse Foundation, now in it's ninth year, continues to be a very important annual event for us. Those who attend are important supporters of our foundations.

The Circle of Giving, established in 2014, has grown from \$310,000 the first year to \$414,000 in 2016. Our community has generously contributed each year to what is now our major fundraising vehicle. Our donors are seeing the tremendous return on this investment. To our Circle members who annually donate, thank you. If you are not a member, please consider joining us in 2017.

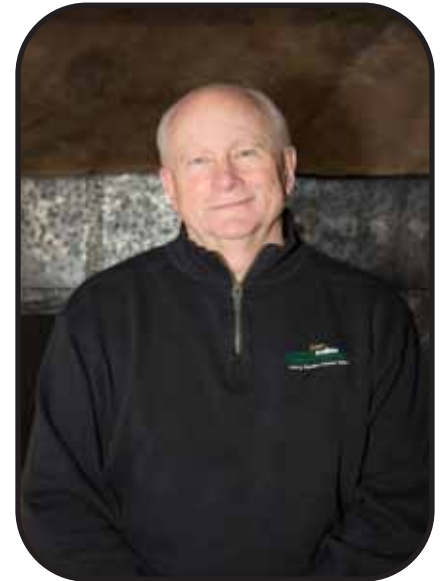
The 2016 Great Fish Challenge grew substantially in it's second year. The number of local charities participating increased from 32 to 40 and the total dollars \$1.1 M to \$1.4 M. 2017 will see an increase to 45 participating organizations.


A strong focus for our President Linda Grady and our board is continuing to increase the number of Donor Advised Funds and Endowment Funds held at the foundation. These successful efforts will insure the long term financial viability of our foundation and ensure the future of many significant programs benefiting our community.

Thank you to all our donors, sponsors, and our community. Your support enables us to continue to help serve the needs of the greater Whitefish area.



Ken Wessels Board Chair



“ Our community has generously contributed each year to what is now our major fundraising vehicle. Our donors are seeing the tremendous return on this investment. To our Circle members who annually donate, thank you.” 

GIVING TOGETHER

GROWING TO SERVE

\$20M Combined Assets under management

\$9M Donor Advised Fund Assets

\$8.6M Endowment Fund Assets

84 Total number of funds held by WCF

43 Donor Advised Funds

24 Permanent Endowment Funds

WHERE GIVING IS AMPLIFIED

COMMUNITY GRANT PROGRAMS

Community Grant Program has awarded over \$1,500,000 since its inception in 2000. In 2015 it provided funding for 76 nonprofit projects and programs totaling \$254,000.

Whitefish Community Foundation understands how important this program is for so many diverse nonprofits. In 2016, the program was changed to become a spring program beginning in 2017.

The Foundation will continue to maintain and build on the many grant programs currently offered but the Great Fish Community Challenge will be the primary grant program. Through our communication with local charities, we have found that more nonprofits would like to participate in the Challenge. As funding for the Challenge grows through the expansion of the Circle of Giving, so will the number of nonprofits accepted to participate in the Challenge each year.



Supporting Whitefish Legacy Partners recreation and conservation efforts.



Helping Whitefish Lake Institute build, maintain, study, and educate on the Living Wetlands running into Whitefish Lake.



Assisting Child Bridge with training and expanding their adoption programs.



Providing Habitat for Humanity funding to expand their affordable home ownership programs.

GIVING TOGETHER

COMMUNITY GRANT PROGRAMS



\$1.5M Total amount of community grants awarded since its inception in 2000

\$5M Total amount of Designated Grants awarded since 2008

\$244,000 Awarded to nonprofits and WCF from the Permanent Endowment Program in 2016

\$71,000 Awarded from the Micro Grant and Emergency Grant Programs since 2009

\$70,000 Awarded from the Endowment Challenge Grant Program since 2010



\$20,000 MAJOR COMMUNITY PROJECT GRANT

Whitefish Sports Facility Foundation for the Stumptown Ice Den



Whitefish Community Foundation was pleased to award a **\$20,000 Major Community Project Grant** to the Whitefish Sports Facility Foundation. The nonprofit organization took over management of the ice rink from the city in 2016 to run it as a year round ice rink. The operating group quickly realized necessary improvements were required to preserve the existing equipment, manage quality ice, and operate year round. Whitefish Community Foundation, along with another \$15,000 from the Krummholz Fund, a Donor Advised Fund held by the Whitefish Community Foundation, stepped in to purchase equipment that would monitor humidity and temperature fluctuations, thereby helping existing equipment run in a more energy efficient manner. Today, the rink is running smoothly and utilized by hundreds of skaters enjoying hockey, figure skating, and public skating year round. Having access to year round ice provides recreation, promotes fitness, and creates a wonderful community gathering space, which was the original intent of the facility when it was built 17 years ago by a group of motivated community members.

GIVING TOGETHER

MAJOR COMMUNITY PROJECT GRANTS

\$368,600 Awarded since the program began in 2010.

13 Major Grants of **\$20,000** or more have been awarded to capital projects benefitting our community and supporting the work of our local nonprofits since 2010.



GIVING TOGETHER

A group of extraordinary individuals giving together to make great things happen in our community. Thank you!

Ken Wessels

CIRCLE of GIVING

AGL Foundation
Teri and Jeffry Allen
Anonymous (2)
Carol and Richard Atkinson
Cindy and Mogens Bay
Elizabeth and William Bayne
Mary Ann and Bill Bindley
Sandra and Dick Boyce
Rockwood Brown in Memory of Marilyn Brown
Janice and James Case
Anne and John Collins
Debbie and Robert Douglas
Barbara and Mike Gallagher
Tanya and Judah Gersh
Michael Goguen
Dick Gordon and Cheryl Watkins
Sarah and John Graves
Cindy and Joe Gregory
Dick Harding and Mary Lloyd
Shannon and Brian Haycox
Michael Honkamp
Bill Howard in Memory of Jean Howard
Ila B. Dousman Fund

Iron Horse Foundation
Barbara and Michael Jenson
Ann and Paul Jeremiassen
John Kramer
Sherry and Dave Lesar
Linda and Charlie Maetzold
Lori Miller
Teresa and Tom Quinn
Nikki and Doug Reed
Karen and Ron Rosenberg
Stacy Schlinger - Schlinger Family Foundation
Shirley and Mark Schmidt
Janna and Jamie Shennan
Carole and Roger Spragg
Lori and Robb Voyles
Dori and Bill Walton
Boots and Alan Warrick
Virginia V. Weldon
Linda and Stephen Wendfeldt
Robin "Byrdie" and Ken Wessels
Ardy and Steve Whisler
Susan and John Witt
Ann and Buck Woodruff

Circle donors contribute \$5,000 or more annually to support all the community grant programs.

GIVING TOGETHER CIRCLE OF GIVING

81 Community minded individuals giving together for the common good.

\$414,000

CIRCLE contributions in 2016 directly benefitting community grant programs offered by Whitefish Community Foundation.

58 2016 Programs serving Whitefish in some capacity benefitting from the Circle of Giving generosity: Micro Grants, Emergency Grants, Great Fish Challenge Grants, and Major Grants.



A MEANS THROUGH WHICH GENEROSITY IS MAXIMIZED

THE CIRCLE OF GIVING

After two years in action, the Great Fish Community Challenge has proven to be an efficient and essential annual fundraising campaign to build the programs and expand the reach of our local nonprofits. Challengers are the critical component to its success! Thanks to a very generous group of individuals in the Circle of Giving, the Community Foundation has awarded over \$530,000 in matching grants in the first two years of the Great Fish Challenge.

The Circle of Giving is the group challenging our community to give. It is helped by the Friends of the Great Fish Match Fund who are very important in adding to the level of the match. In 2016, Friends of the Great Fish Match added \$49,000 to the match bringing the match percentage to 55% on the first \$15,000 raised by each nonprofit, for a total match of \$322,000.



Jill Courtney

“ The Great Fish Challenge is working because the Circle of Giving Challengers - a like minded group of individuals who intrinsically value philanthropy - inspire the entire community to give. Being a Challenger is a special opportunity to support the tremendous nonprofits working to better our community. We encourage you to join this extraordinary group that is the backbone of the Great Fish Community Challenge.”

**JOIN THE CIRCLE OF GIVING and
BECOME A GREAT FISH CHALLENGER**



\$1,486,546!

Great Fish Challenge Color Run 2016. Photo Credit Whitefish Pilot Matt Baldwin



WHERE A COMMUNITY IS INSPIRED

WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

Great Fish Community Challenge, after an amazing first year, exceeded expectations again, raising over \$1,486,546 in the second annual campaign. The Great Fish Community Challenge is an innovative fundraiser built on a very successful platform used by other community foundations around the country. It is a campaign that inspires the community to give to their favorite nonprofits to help earn a matching grant from the Whitefish Community Foundation.

After just two years in action, the Great Fish Challenge has raised a total of \$2,613,406 benefitting 43 different charities and supporting community causes such as boosting education, assisting conservation efforts, supporting community members in need, and improving recreation.

JOIN THE CHALLENGE IN 2017 and GIVE TO YOUR FAVORITE NONPROFITS.

GIVING TOGETHER

\$1,486,546 RAISED

2,400

Over 2,400 gifts were made by nearly 1,200 donors, including 48 Circle of Giving Challengers and 97 gifts to the Friends of the Great Fish Match during the 2016 Challenge! The average gift size was \$500.

INVESTED

\$322,000

Challengers in the Circle of Giving and Friends of the Great Fish Match Fund contributed over \$322,000 to match the donations of the community, stretching those philanthropic dollars even further. These donors truly inspire our community to give.

IMPACTED

43

Nonprofits from all sectors of the charitable spectrum were impacted by the Great Fish Challenge. The average raised by each nonprofit was nearly \$26,000!

GREAT FISH COLOR RUN AND COMMUNITY CELEBRATION



Glacier Nordic Club



Farm Hands



Whitefish Theatre Company

WHERE DONORS ARE MOTIVATED

“ I moved to Whitefish over 20 years ago and living in this community means so much to me! It's where I found my closest friends, my love for the mountains, my husband, and now raise my two beautiful children. I love investing my time and energy into the many facets of this wonderful place: the great outdoors and Glacier Park, the rich arts and music community, farming, skiing, sports, and so much more! Annual giving has always been important to me. There are many wonderful organizations that make Whitefish the best place to live.

As I transitioned through careers, from service industry to music education and non-profit leadership, I have experienced the other side of the giving coin. The Great Fish Challenge is instrumental to the fundraising efforts of many non-profit organizations serving our community. It makes raising money efficient and fun. Organizations can truly celebrate their efforts at the culminating Great Fish Fun Color Run. It's never been easier or more fun to raise money for the North Valley Music School! Thank you to the Whitefish Community Foundation and to all those who support our community through Great Fish Challenge!"

*~Deidre Corson, Executive Director,
North Valley Music School*



Kayla Nickells

GIVING TOGETHER

2016 TITLE SPONSOR: BNSF Railway Foundation • **Supporting Sponsors:** Big Sky IV Therapy and Big Sky Compounding Pharmacy • First Interstate Bank • Glacier Bank • Iron Horse Foundation • JCCS, CPAs • National Parks Realty • Park Side Credit Union • **BUSINESS INSTANT GRANT SPONSORS:** Buffalo Café • Stumptown Snowboards • Whitefish Lake Restaurant • Whitefish Mountain Resort • **INKIND SPONSORS:** CH Robinson • Costco Wholesale • Great Northern Brewery • Grouse Mountain Lodge • Kalispell Creamery • Montana Coffee Traders • Safeway • Super One Foods • The WAVE • Third Street Market • Whitefish Pilot





HELPING OUR COMMUNITY RUN

• Abbie Shelter	\$46,491	• Habitat for Humanity of Flathead Valley	\$45,237
• Alpine Theatre Project	\$36,620	• NC Foundation	\$24,180
• Backpack Assistance Program	\$30,975	• North Valley Food Bank	\$50,044
• Bob Marshall Wilderness Foundation	\$34,482	• North Valley Hospital Foundation	\$38,865
• CASA For Kids	\$62,675	• North Valley Music School	\$47,059
• Center for Restorative Youth Justice	\$30,081	• Project Whitefish Kids	\$28,657
• Child Bridge	\$74,735	• Shepherd's Hand Free Clinic	\$65,945
• DREAM Adaptive Recreation	\$32,348	• Sparrows Nest of NW Montana	\$41,622
• Farm Hands/Nourish the Flathead	\$25,799	• Stumptown Art Studio	\$23,705
• Flathead Cancer Aid Services	\$37,340	• Tamarack Grief Resource Center	\$23,590
• Flathead Nordic Backcountry Patrol	\$24,330	• The WAVE	\$8,532
• Flathead Shelter Friends	\$36,855	• Whitefish Education Foundation	\$39,396
• Flathead Ski Education Foundation	\$24,625	• Whitefish Firefighters Association	\$25,895
• Flathead Youth Home	\$29,040	• Whitefish Lake Institute	\$37,545
• Friends of Flathead Avalanche CTR	\$24,155	• Whitefish Legacy Partners	\$63,063
• Glacier Institute	\$48,165	• Whitefish Review	\$30,898
• Glacier National Park Conservancy	\$34,425	• Whitefish Rotary Charitable Fund	\$23,310
• Glacier Nordic Club	\$25,080	• Whitefish Sports Facility Foundation	\$30,505
• Glacier Symphony and Chorale	\$33,641	• Whitefish Theatre Company	\$48,960
• Glacier Twins AM Legion Baseball	\$16,895	• Whitefish Veterans Support Team	\$67,255

Jill Courtney

WHERE FUTURES ARE MADE BETTER FOR ALL

“ The Backpack Assistance Program (BAP) has greatly benefited from the Great Fish Challenge. The funds that we have received have enabled us to distribute 84 food bags every Friday to help supplement children in need. Each bag is filled with 5 servings of fresh fruits and vegetables, as well as cans of tuna, hot cereal, noodles, and pepperoni sticks. We also provide 275 food bags for school closure days and spring break. Without the Great Fish Challenge, these additional distributions wouldn't be possible.

I first volunteered for the BAP program starting in 2012. The director then was Heather Lockert. She approached me in the spring of 2014 to take over her position as director because she was moving east to be closer to her family. I took the task on with open arms and open heart. My goal was to find the funding required to continue to provide food assistance to the increasing number of children in need in Whitefish. I am proud to be part of a program that not only makes a difference in children's nutritional needs but in their hearts.”

~Traci Stolte, Volunteer Director
Backpack Assistance Program



WHITEFISH MOUNTAIN RESORT



Photo Courtesy: Brian Schott

Since inception, over \$900,000 from the Patron Ski Pass Program has been awarded to area nonprofits through the generosity of Whitefish Mountain Resort.

In 2016, the program provided over \$93,000 in support to 62 local nonprofit organizations around the Flat-head Valley. And, it is an annual source of support for the charitable work of the Whitefish Community Foundation.

The Program makes possible the free ski pass program for 5th grade

students each year. It is a major source of funding for DREAM Adaptive Recreation, supporting their work to assist individuals with disabilities, so they can enjoy winter recreation through the adaptive skiing program.

The Patron Pass Program also provides significant annual support to Alpine Theatre Project, Glacier Symphony and Chorale, and Whitefish Theatre Co. and, it provides funding for over 40 organizations supporting the health and human service needs in our surrounding communities.

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



**WHITEFISH LAKE
GOLF CLUB**

WHITEFISH LAKE GOLF CLUB

The Patron Golf Pass Program offers a limited number of transferable golf passes or two individual season passes. Since its inception in 2007, a total of \$77,000 from the sale of golf passes has benefited the Community Foundation's charitable work supporting our nonprofit community. Programs like the Patron Ski and Patron Golf provide necessary funding

for the operations of the Community Foundation to ensure that the unrestricted donations to the foundation go to the many community grant programs offered each year.

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

STRENGTHENING NONPROFITS

PRINCIPALS AND PRACTICES OF NONPROFIT OVERSIGHT

Nonprofits constantly strive to build and engage an active board of directors. The challenge for new board members is not just committing the time, but understanding what is required and how to best help the organization. Whitefish Community Foundation has become a resource where nonprofits can turn to build stronger board governance and accountability. The Community Foundation offers training for nonprofit staff, volunteers, and board as a free service in an effort to help nonprofits become efficient, transparent, and provide good governance.



Jesse deVine

Supporting Whitefish Theatre Co.'s productions like *The Neverending Story* to enrich our community.

"WCF workshops are an invaluable source of relevant and current information as well as a chance to network with non-profit peers."

~ Cameron Blake,
Executive Director,
Glacier Nordic Club

“ My recollection of the first workshop is how well organized and informative the presentation was as Linda walked us through what board members should know, what to include in a board manual along with necessary board policies, and why the orientation of new board members is crucial to our organization.”

~ Norma MacKenzie, Board of Directors, Whitefish Theatre Co.

2016 Nonprofit Attendees:

- | | |
|--|---------------------------------------|
| A Ray of Hope | NC Foundation |
| Back Country Horsemen of the Flathead | Nonprofit Development Partnership |
| Bob Marshall Wilderness Foundation | North Valley Food Bank |
| Boys and Girls Club of Glacier County | North Valley Hospital Foundation |
| CASA for Kids | North Valley Music School |
| Center for Restorative Youth Justice | Ravenswood Outdoor Learning Center |
| Chihuahuas Forever Home | Salvation Army |
| DREAM Adaptive Recreation | Shepherd's Hand Free Clinic |
| Farm Hands | Stumptown Historical Center |
| Flathead Valley Ski Education Foundation | Sunburst Community Service Foundation |
| GIA Wellness | The WAVE |
| Glacier Institute | Whitefish Animal Group (WAG) |
| Glacier Nordic Club | Whitefish Lake Institute |
| Habitat for Humanity of Flathead | Whitefish Legacy Partners |
| Human Therapy on Horseback | Whitefish Library Association |
| Humane Society of NW MT | Whitefish Review |
| Immanuel Lutheran Communities | Whitefish Theatre Company |
| KittyMom's Rescue Organization | |
| Montana Equestrian Events | |
| Montana Outdoor Legacy Foundation | |

GIVING TOGETHER

HELPING NONPROFITS

974

Number of nonprofits serving Flathead County

221

Number of nonprofits in the Whitefish area

Working together we will change lives for the better both today and tomorrow.



Ellen Moak (Left) 2016 recipient of the GRG, R.I.S.E. Scholarship (Restaurant Industry Scholarship Endowment administered by the Whitefish Community Foundation). Ellen is currently finishing her first year of nursing at Montana State University, Bozeman, working on the Billings Campus. GRG, R.I.S.E. Scholarship is funded by the Glacier Restaurant Group through their Round It Up America program.

WHERE FUTURES ARE MADE BRIGHTER FOR ALL

SCHOLARSHIP FUNDS

Establishing a scholarship fund is a common charitable goal for many individuals and organizations. It is a wonderful way for donors to give back to the community in recognition of their appreciation for education.

Consider establishing a scholarship fund:

- When you want to make a difference in the lives of others.
- Because you see the potential in every student.
- Because you understand a college degree increases lifetime earning potential.
- To memorialize a loved one.
- Because you share a belief that each student should have this opportunity regardless of their financial situation.

Setting up your own named scholarship fund is great way to support the education dreams of the youth and returning adult students in our community.

Whitefish Community Foundation makes it easy for you to establish a scholarship fund. We will help you develop the selection criteria, distribute scholarship applications in the community and handle all the administration of the program.



TOTAL CUMULATIVE
GRANTS OVER 16
YEARS OF GIVING
TOGETHER:

\$19.7M

GIVING TOGETHER

BUILDING SUSTAINABILITY

ENDOWED PHILANTHROPY

The Whitefish Community Foundation places high priority on developing endowment funds to increase sustainability for nonprofits. The Community Foundation helps local nonprofits build endowment funds through an *Endowment Challenge Grant Program*.

“ **Join us in making endowment development a priority by donating to a nonprofit endowment fund this year.** ”

The following nonprofit organizations have set up permanent, non-revocable endowment funds with the Whitefish Community Foundation, demonstrating their commitment to building a sustainable source of funding to ensure the future of their programs:

- Alpine Theatre Project
- Bob Marshall Wilderness Foundation
- Back Country Horsemen of the Flathead
- CASA for Kids
- First Presbyterian Church of Whitefish
- Glacier Symphony and Chorale
- Human Therapy on Horseback
- Humane Society of NW Montana
- North Valley Food Bank
- North Valley Hospital Foundation
- North Valley Music School
- Patrol Fund
- Shepherd's Hand Free Clinic
- Stumptown Art Studio
- Stumptown Historical Society
- WAVE Scholarship Endowment Fund
- Whitefish Community Foundation
- Whitefish Education Foundation
- Whitefish Legacy Partners
- Whitefish Community Library
- Whitefish Library Association
- Whitefish Theatre Company



Brenda Ahearn

Alpine Theatre Project's permanent endowment is providing important funding to bring Broadway artists to perform and teach now and in the future.



Shepherd's Hand Free Clinic is not just about treating the sick and providing dental services to those with no ability to pay. It also provides a healthy, weekly meal to anyone in need. Shepherd's Hand has made building its permanent endowment a priority to sustain its programs for the long term.

GIVING TOGETHER

AGENCY ENDOWMENT FUNDS

22 Permanent Endowment Funds working for nonprofits today and building sustainability for tomorrow.

3 Endowment Challenge grants of \$5,000 each awarded in 2016 to nonprofits holding endowments with WCF.

\$243,970

Grants distributed from endowments to nonprofits in 2016.

\$1.1M

Total distributions from endowment funds since program inception in 2004.





Photo Courtesy: Cassidy Grady

Bob Marshall Wilderness Foundation established a Permanent Endowment Fund with Whitefish Community Foundation in 2013 to support their conservation and stewardship programs that help hundreds of volunteers, including youth, develop a land ethic by opening trails, restoring heavily used areas, maintaining historic structures, and fighting weeds. Established in 1964, the Bob Marshall Wilderness covers 1.5 million acres and is the largest wilderness in the lower 48 states.

MONTANA ENDOWMENT TAX CREDIT

The Montana Endowment Tax Credit helps build charitable endowments while offering donors a federal income tax savings and a state tax credit. It can help you avoid federal capital gains tax. If you are interested in learning how you can earn up to \$10,000 in a state tax credit (\$20,000 if filing jointly) call us at 406-863-1781 or visit www.whitefishcommunityfoundation.org.

Giving to a permanent endowment fund is good for Montana, good for donors, and good for our local nonprofit's charitable programs.

GIVING TOGETHER IN MEMORY

JEAN HOWARD MEMORIAL FUND

In June of 2016 we lost a dear friend of the Foundation and Whitefish, Jean Howard. Although Whitefish was Jean's second home, the Whitefish Community Foundation and the community of Whitefish always came first. Jean cherished the first rate performing arts in Whitefish and the sense of community. Each year Jean supported many charitable causes in Whitefish.

Bill Howard, Jean's husband, along with friends and family, made gifts in her memory to the



Liz Manley of Tamarack Grief Resource Center accepts the Jean Howard Memorial Award from Bill Howard at the 2016 Great Fish Grant Awards.



Doug Reed stands with Bill and Jean Howard at the Summer Art Social in Whitefish.

Whitefish Community Foundation establishing the Jean Howard Memorial Fund.

Bill Howard presented the Jean Howard Memorial Award to the first recipient Tamarack Grief Resource Center recognizing their grief and healing work with youth dealing with the loss of a loved one. The special recognition comes with a \$2,500 grant.

DONORS TO THE JEAN HOWARD MEMORIAL FUND

Aitken, Aitken & Cohn, LLP
Allergen, Inc.
Stella Arbitman
David and Mary Augustine
David Batson
Diane Bohack
Francis and Carol Breidenbach
Stephen and Diana Bulkeley
Sarah Burt
Tod and Susan Campbell
Valerie Cantwell
Gillen Causey
Gina Christman
Monte Collins and Deborah Slimmer
Charles and Judith Crockett
George and Patricia Davis
Mark Davis
Diana Defulviis
John and Zoila Di Re
Charles Diiorio
David and Frances Dittman

Brian and Shelly Ehler
First Interstate Bank
Dennis and Kathryn Gauhan
Stephen Geane and Jeanne Boyce
David Grady and Linda Engh-Grady
Herman and Donna Hakala
Brad and Cheryl Howard
Harrison Howard
James and Donna Howard
Steve and Jodi Howard
Thomas and Judith Howard
William Howard
Thomas Jablonowski and Janet Keuper
Gregory Kishel
John and Christine Lentz II
Mac MacLean
Mayfair West 2 Summer Team
Gerard and Heather Mercier
Edward Millett
Mitch-Stuart, Inc - Michelle Cohen and
Stuart Paskow

Bruce Moses
Robb and Jendy Nen
John and Rosalie O'Brien
Kevin and Leslie O'Brien
Jeff and Carol Payetta
Milton and Mary Perlow
Albert and Joyce Pincek
Mary Porter
Powers Design and Development - Greg Powers
Thomas Reitz and Marianne Plunkett
Janice Reyes
George Saltzberg
SC Hydraulic Engineering
David and Tammie Schulman
Richard and Diane Schwartz
Scott and Carol Singer
Jon and Karen Stallings
The Ueberroth Family Trust
Richard and Judith Voltmer Foundation
Russell and Diane Walters
Webb Family Foundation
Tracy Wood





Whitefish Pilot Heidi Desch

GREAT FISH AWARD

PROJECT WHITEFISH KIDS

Project Whitefish Kids, a volunteer organization that maintains the Smith Fields recreation and sports complex, received the 2016 Great Fish Award in recognition of their outstanding performance during the Great Fish Community Challenge.

Smith Fields is a 55 acre youth sports complex that is home to Flathead Rapid Soccer Club, Cal Ripken Little League Baseball Club, Flathead Lacrosse Club, and Whitefish Youth Softball program. The sports complex also provides home fields for Whitefish High School's soccer and softball teams.

Project Whitefish Kids manages the 55 acre complex using a majority of volunteer help. This includes regular mowing, irrigation, field prep, bathroom maintenance, parking lot maintenance, and playground equipment maintenance. All equipment and facility upgrades are funded by private donations and user fees.

The Great Fish Award, which includes a \$2,500 grant, annually recognizes an organization that provides significant benefit to the community. Going forward it will continue to distinguish a nonprofit for their outstanding efforts during the Great Fish campaign.



Kaya Nickells

RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD

WHITEFISH FIREFIGHTERS ASSOCIATION

In 2014, the Board of Directors for the Whitefish Community Foundation established the **Russ and Mary Jane Street Community Service Award**. Each year this special award, which comes with a \$2,500 grant, recognizes the important work a nonprofit provides to the community and honors the spirit of Russ and Mary Jane Street's bequest to our community.

Whitefish Community Foundation is honored to recognize the Whitefish Firefighters Association as the 2016 recipient. Whitefish Firefighters Association is an active nonprofit that works to raise critical funding to improve emergency services for Whitefish. The organization was founded in 2005. They have been an active participant in the Great Fish Community Challenge in both 2015 and 2016 raising money for emergency equipment.



DORIS SCHUMM COMMUNITY SPIRIT AWARD

WHITEFISH EDUCATION FOUNDATION

Doris Schumm was a dear friend to the Whitefish community and the Whitefish Community Foundation. Her bequest to the Foundation in 2011 established the Doris Schumm Community Spirit Award. Now in its 5th year, the special award recognizes an organization that embodies the spirit for community that Dorie embraced.

Whitefish Community Foundation is honored to recognize the 2016 recipient, the Whitefish Education Foundation. The mission of the Whitefish Education Foundation is to enhance the quality and scope of educational opportunities for all students of the Whitefish Public Schools. The Education Foundation is a fitting choice for this award because at one time in her life, Dorie was a substitute teacher. This special honor comes with a \$2,500 grant. Special thanks to Doris's family for their continued support for the Doris Schumm Community Spirit Award: James Zeigler, David Zeigler, and Carol Prime.



Kayla Nickells

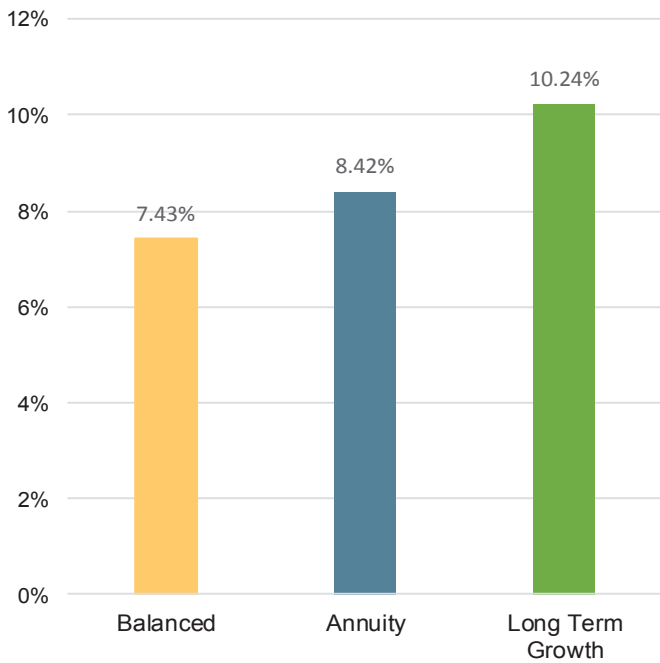
FINANCIAL STEWARDSHIP

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

FINANCE AND STEWARDSHIP COMMITTEE

- John B. Collins, *Chair*
Retired, CEO - John B. Collins Associates
- Jeff Allen
Technology, NetApp and Barracuda Networks
- David Dittman
President, First Interstate Bank
- Jay Latimer
Retired, Entrepreneur
- Jamie Shennan
Venture Capital, Trinity Ventures
- Dave Stewart
Retired, International Banking
- Ken Wessels
Retired, CEO, Wessels, Arnold & Henderson
- John Witt
Retired, Bill Matrix Corporation

INVESTMENT RESULTS 2016



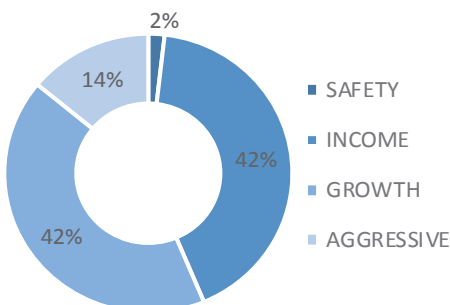
FINANCIAL DISCLOSURES

Investment Firm: Mason Investment Advisory Services, Reston, Virginia
 Investment Manager: Allison Gormier
 Custodian: TD Ameritrade
 CPA: Sallie Foley, JCCS, CPA, Whitefish
 Auditor: Tony Vanorny, JCCS, CPA, Kalispell

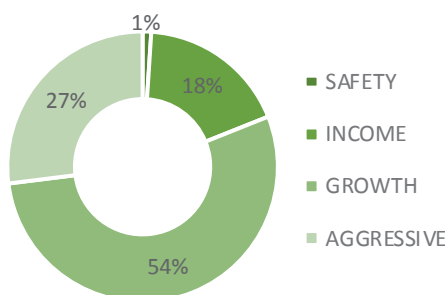
The Whitefish Community Foundation is a public foundation, operating under sections 501(c)(3) and 509(a)(1) of the Internal Revenue code as a public charity. I.D. #81-0533002. Review annual 990 report at www.whitefishcommunityfoundation.org

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

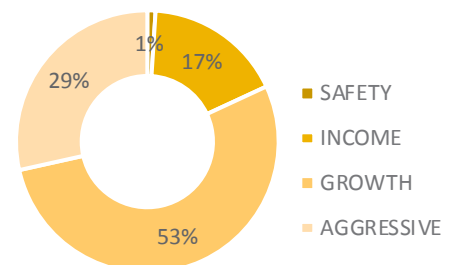
BALANCED POOL ALLOCATION



ANNUITY POOL ALLOCATION



LONG TERM GROWTH POOL ALLOCATION



DONOR ADVISED FUNDS

With a Whitefish Community Foundation Donor Advised Fund, you make one gift to establish your fund and then you can take your time deciding which organization to recommend for grants. There is only one tax receipt to keep track of and one check to write. A Donor Advised Fund allows you to organize all your charitable activities through one professionally managed and cost-effective charitable vehicle. The Community Foundation will do all the work for you.

By holding your fund with the Whitefish Community Foundation, your administrative fees are supporting programs benefitting your community and making it possible for the Foundation to expand its charitable impact.

Creating a Donor Advised Fund is simple:

- You make a gift of \$5,000 or more to establish a fund, and receive an immediate tax deduction. Additional gifts can be made to grow your fund.
- You recommend grants from your Donor Advised Fund to all your favorite 501(c)3 charities no matter where they are located.
- We offer online fund access 24 hours a day and online grant submission so that you can access your fund from anywhere.
- Administrative fee of .60% or less is charged annually.
- We offer confidentiality in all your charitable giving.
- You will have access to our due diligence on all your grants and our semi annual Community Connections newsletter.
- We offer flexible and strategic investment options as part of our \$21 million portfolio (2017) so that you can invest your fund and grow your charitable dollars over time.

GIVING TOGETHER

DONOR ADVISED FUNDS

43

Donor Advised Funds

\$1.9

Grants distributed from Donor Advised Funds in 2016

\$9 M

Donor Advised Fund assets under management



Our Donor Advised Funds assist North Valley Food Bank to feed our neighbors in need.



Donor Advised Funds help renovate the North Valley Music School.



Donor Advised Funds help DREAM Adaptive Recreation expand their adaptive skiing programs.



Donor Advised Funds support conservation, education, and sustainability projects in Glacier National Park through the work of Glacier National Park Conservancy.

2016 BY THE NUMBERS



COMPOSITE OF GRANTS 2016 YEAR END

in thousands

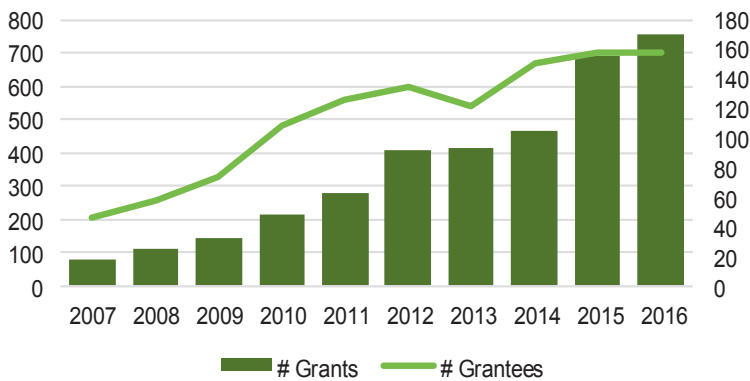
Donor Advised Fund Grants	\$1,905
Designated Fund Grants	\$576
Great Fish Designated Grants	\$1,150
Great Fish Match Grants	\$336
WCF Grant Programs	\$62
Endowment Distributions	\$244
TOTAL GRANTS:	\$4,273

COMPOSITE OF GIFTS 2016 YEAR END

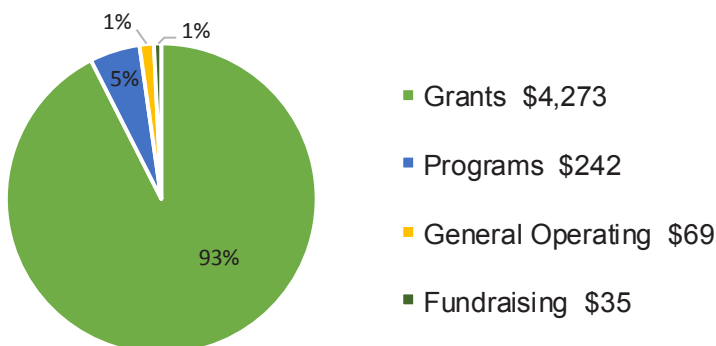
in thousands

Designated Funds	\$1,283
Great Fish Funds	\$1,156
Donor Advised Funds	\$6,708
Agency Endowment Funds	\$723
Scholarship Funds	\$13
Annuity Funds	\$77
WCF Grant Funds	\$532
WCF Endowment Funds	\$122
WCF Unrestricted Funds	\$279
TOTAL GIFTS:	\$10,893

10yr GROWTH OF GRANTS



Expenses (in thousands)



LEAVE A LEGACY

“If you’re going to live, leave a legacy, make a mark on the world that can’t be erased.”

~Maya Angelou

Cassidy Grady

ENRICHING THE FUTURE OF WHITEFISH

The Legacy Society recognizes donors who have made a gift to the Whitefish Community Foundation in their will or estate plans. Planned gifts may include revocable and irrevocable bequests, trust arrangements, life insurance, deferred gift annuities, and Legacy Funds.

If you have made a gift provision in your will please let us know so that we can recognize your generosity in your lifetime.

LEGACY SOCIETY MEMBERS

Anonymous (2)	John Kramer Jr.
Carol and Richard Atkinson	Janice and Paul McCann
Cameron Blake and Sandy Gray	Doris Schumm*
Caryl and Bob Bennett	Janna and Jamie Shennan
Anne and John Collins	Dave Stewart
Martha and Jeffrey Hamilton	Mary Jane and Russ Street*
Connie and Jake Heckathorn	Virginia V. Weldon
Joaquenia and Klaus Heinrich	Susan and John Witt
Kristin and Gregory Hetzer	*deceased
Fay and Peter Jones	

LEGACY FUNDS

You can make a bequest in your will and set up a Legacy Fund at the Whitefish Community Foundation to accept this bequest and designate it to the charities or causes you have enjoyed supporting during your lifetime. The Foundation will manage your bequest to allow it to grow and continue to benefit your community in your name.

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

THANK YOU 2016 DONORS!



Donors who directly support Whitefish Community Foundation programs.

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

Adams, Gregory and Kristina
Adams, William and Olga *
AGL Foundation
Allen, Jeffry and Teri *
Alpine Village Centre *
Alves, Deborah
Amazon Smile
Andenoro, John and Lynn *
Ash, Gordon and Susan Kemper
Ashton, Harry and Mary Dojnik
Atkinson, Richard and Carol *
Babiak, Timothy and Linda
Barasch, Steven and Charlene *
Barker, Rod and Marianne
Bay, Mogens and Cindy *
Bayne, William and Elizabeth *
Bennett, Bob and Caryl *
Bennett, Michael and Merry Lynn Southers *
Bergland, Todd
Berman, David and Sandra
Besing, Gil J. *
Biele, Alexander and Kathleen
Friday
Big Sky I.V. Therapy
Big Sky Compounding Pharmacy
Bindley, William and Mary Ann
Bishop, Robert and Rita *
BNSF Railway Foundation
Bocci, Eileen
Boorman, Barbara
Boyce, Richard and Sandra *
Briester, Matthew and Tara
Broussard Charitable Foundation
Brown, Harry and Nancy *
Brown, Rockwood
Bruzek, Bill and Judith *
Bryan, Kirk and Harriet
Budge, Ronnie
Buffalo Cafe
Burke, Ryan and Kristine *
Cabin 6, Inc.
Campbell, Luther and Dorothy *
Campbell, Sandra
Cardan, Phil and Adriene *
Carpenter, Joshua and Amber
Carpenter, William and Susan *
Carson, Tom and Barbara
Carstens, Sue
Case, James and Janice *
Casteel, Bob and Patsy
Centron Services, Inc
Chalich, Jean
Chaney, John *
Chauner-Niendorf, Cynthia J.
Chickering, Nick and Karen *
Church, Brett and Lesa
Chute, Terry and Jane Kollmeyer *
Clearwater, Ron and Lauren Sparks
Collins, Ed and Doris
Collins, John and Anne *
Colman, Thomas and Gail *
Corbett, Thomas and Maureen
Cornutt, Doc and Linda *
Coyne, Wendy *
Creech, Randy and Kay
Decker, Gary and Jane
Dittman, David and Frances *
Don K Chevrolet-Subaru *
Donaldson, Mark and Lynnette
Doney, Michael and Jennifer
Douglas, Robert and Debbie *
Dunker, Jerry and Lissa *
Duvall, Bill and Rusty
Eisenberg, Steve and Cristina
Erickson, Leif and Carole *
Ericson, Dave and Sarah
Ferrara, John N.
First Interstate Bancsystem Foundation *
First Interstate Bank *
Fitzpatrick, Bill and Maureen
Fuller, James D.
Fun Beverage *
Gaffin, Kathleen
Gallagher, Mike and Barbara
Garrison, Greg and Kathy
Gersh, Judah and Tanya *
Gersh, Robert and Kathryn *
Gist, Steve and Ginny
Glacier Bank *
Glacier Jet Center *
Glaser, Jonathan and Nancy
Glatz, Robert and Judy
Good, Wanda
Goodwillie, Catherine
Gordon, Miles and Jan *
Gordon, Richard and Cheryl Watkins *
Grady, David and Linda Engh-Grady *
Grant, Peter and Colleen
Gratch, Alan and Sallie
Graves, John and Sarah *
Gray, Alexander and Cameron Blake *
Gregory, Joe and Cindy
Groschupf, James and Irene *
Grove, Larry and Dianne *
Hale, Martin and Eleanor
Harding, Richard and Mary Lloyd
Harding, Tom and Sue *
Harman, Stephanie
Haselden, Hap and Helen
Haycox, Brian and Shannon *
Heckathorn, I. James and Connie
Heideman, Chuck and Carol Tanko
Heinrich, Klaus and Joaquenia *
Hildner, Richard and Suzanne Daniell Hildner *
Hileman, William and Susan Lacosta
Hobbs, Russell and Linda
Hobgood, William and Molly
Holdhusen, Chris and Kathryn Neff
Honkamp, Michael *
Howard, Bill *
Hughes, Richard and Pam
Hurd, Bernard
Ila B. Dousman Fund *
Iron Horse Golf Club *
Jacobsen, David and Janice
JCCS CPA's
Jenson, Mike and Barbara *
Jeremiassen, Paul and Ann *
Jeske, Stephen and Lisa *
Johnson, Christopher and Melanie
Klawiter
Johnson, Jon and Diane
Johnstone, Steve and Pat
Jones, Samuel and Patricia
Jones, William and Ann *
Kasper, Bertha *
Kasper, Gregory and Connie
Kelton, David and Rachel
Kiley, Anne
Kirk, Philip and Lesia
Koopal, Mike and Mae
Kramer, John *
Lamb, Paul
Larsen, Marcella
Latimer, Jay and Mignon *
Lesar, David and Sherry
Leverenz, Barbara
Lewensohn, Leonard and Carol
Lindemann, Kurt S.
Losleben, George and Connie
Johnson
Lovasz, Greg *
MacCarter, Daryl and Karen
Maetzold, Charles and Linda
Malone, James and Janet
Mance, Mark and Katie Callahan *
Marsico, Chris
Matelich, Ron and Swithin McGrath
McCann, Paul and Janice
McCarty, Charles and Annie Lent *

* Indicates donors who have made a charitable contribution annually for the past five consecutive years. **BOLD** indicates donors who have made a charitable contribution annually for the past ten consecutive years.

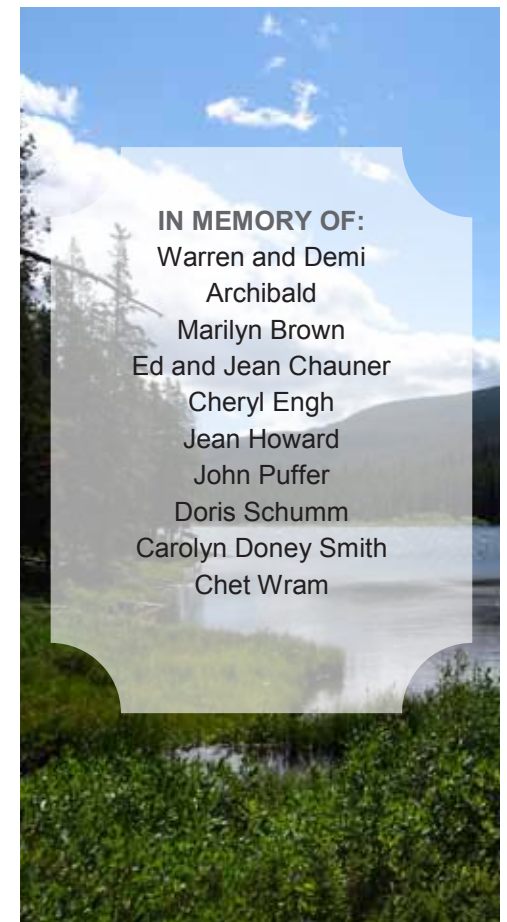
McGovern and Company
 McGowan, Greg and Dana
 McGowan, Kenneth and Dorothy
 McKeever, Marlin and Maureen
 Mechem, Jim and JeanAnne Swope *
 Meislik, Jerry and Rhona
 Milisci, Chris and Abbie *
Miller, Ronald and Jean *
 Minner, Don and Barbara
 Mitchell, Robert and Molly
 Montana Basement Solutions
 Montana Community Foundation *
 Moody, Karl and Carol
 Moran, R. Matthew and Ellen
 Moran, Thomas A.
 Moses, Bruce
 Mountain Mini Storage
 Mumma, Harlan and Nancy Hyde
 Murzin, Mark and Kris Knoerschild
 National Parks Realty of Whitefish *
Nelson Hardware, Inc. *
 Nelson, Leif and Gloria *
 Newton, Roland & Jo
 Northwest Imaging, PC
 Northwest Parts & Equipment Co.
 O'Brien, Kevin and Leslie *
 O'Connor, Helen
 Oglesby, William and Audrey
 Oleson, Doug and Beverly
 O'Neil, Marcia
 O'Neil, Robert and Christy
 Origitano, Thomas and Claudine *
 Oscadal, Francis and Joanne
 Palmer, Andy and Desi
 Parkside Credit Union
 Pastor, Monica *
 Pasvogel, Linda
 Penzi, Lori
 Perez, Daria and Juan
 Peschel, Laura
 Pohl, Richard and Carol *
 Pomerantz, Benjamin and Alison
 Porro, Lonnie
 Potthoff, Ronald and Julie
 Procida, John and Clarisse
 QuietSpacing LLC
 Quinn, Thomas and Teresa *
 Ralston, Henry and Rita
 Randall, Kim
 Reed, Doug and Nikki *
 Reger, Joseph and Lizanne
 Reid, Louisa
 Reilly, Hugh and Teresa
 Reisch, Duane and Dawn
 Repke, John and Beth
Ridder, Christopher and Susan
Moffitt *

Roston, Francine
 Ruhana, George and Kim
 Rygg, Charlene
 Sanderude, Scott and Julia *
 Satterlee, Alan
 Schlinger Family Foundation *
 Schmidt, Mark and Shirley
 Schwartz, Richard and Diane
 Schwartz, Scott
 Scurlock, Jon and Misty *
 Seeds, Charles and Susan *
 Shaw, Tim and Hilary
 Shennan, Jamie and Janna *
 Silverman, Paul and Constance *
 Sliter, Justin and Jennifer *
 Smith, Elvira
 Smith, Mike
 Smith, Will and Bonnie
Solberg, Richard and Jane *
 Spain, Amy
 Spragg, Roger and Carole *
Stanley, Christine *
 Stark, Warren and Teresa
 Stebbins Orthodontics
 Stein, Morris and Catherine *
 Sterling, Steven and Jennifer *
 Stevens, Richard and Ellen Johansen
 Stevens, Robert and Margaret
Stewart, David *
 Stimpson, Kim and Kelly
 Strosahl, John and Judith
 Stumptown Snowboards
 Sukkarie, Fadi and Rawa Sarji
 Swander, Amy
 Tabor, Joe and Kristin
 Tannehill, Bruce and Gail Cleveland *
 Taylor, Kent and Kim
 Taylor, Loren
 The Cuisine Machine
 Third Street Market
 Thompson, Amy
 Thompson, Janice
 Thompson, Steve and Nancy Woodruff
 Tim J. Murphy Insurance Agency
 Tinkler, Richard and Edie
 Torgeson, Pat and Cynthia Sillers
 Trundle, John and Sylvia *
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 Ward, Benjamin and Katherine
 Warrick, Alan and Boots *
 Weldon, Virginia and Francis Austin *
 Wendfeldt, Stephen and Linda
 Wessels, Ken and Robin "Byrdie" *
 Whisler, Steven and Ardy *
 White, Daniel
 Whitefish Animal Hospital, PC *

Whitefish Credit Union *
 Whitefish Lake Restaurant *
Whitefish Mountain Resort *
 Whitten, Ben and Roberta *
 Williams, David and Judy *
 Williams, Timothy and Amy
 Wise, Doug and Bet *
Witt, John and Susan *
 Wolf, Trisha
 Woodruff, Richard and Ann
 Yerger, Wirt and Linda *
 Young, Alison *
 YourCause, LLC
 Yunck, Tami
 Ziegler, David *
 Ziegler, James *

IN HONOR OF:

Richard and Carol Atkinson
 Francis Austin and Virginia Weldon
 Luther and Dorothy Campbell
 Judy Hewson
 John Kramer
 Carol Lewensohn
 Wallace Opdycke
 JeanAnne Swope
 Brian Tanco
 John Zoltek



IN MEMORY OF:

Warren and Demi
 Archibald
 Marilyn Brown
 Ed and Jean Chauner
 Cheryl Engh
 Jean Howard
 John Puffer
 Doris Schumm
 Carolyn Doney Smith
 Chet Wram

DONORS

LEADERSHIP - BOARD OF DIRECTORS



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Technology Industry



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Retired, Business Owner



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Grants Committee Chair
Retired, Micro Electronics



John Collins
Investment Committee Chair
Retired, John B. Collins
Assoc.



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Past Board Chair
President, First Interstate
Bank



Judah Gersh
Attorney, Viscomi and
Gersh PLLP



Joe Gregory
Business Owner



Mike Jenson
Former Mayor of Whitefish
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President/CEO Los
Serranos Country Clubs



Jay Latimer
Retired, Entrepreneur



Sherry Lesar
Founder and Managing
Partner, Stargazer Land
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Lori Miller
Attorney, Lori Miller Law



Monica Pastor
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FVCC



Tom Quinn
Retired, Radiologist,
Medical Center Radiology
Group



Doug Reed
Owner, Whitefish
Lake Restaurant



Jamie Shennan
Nom/Gov Committee
Chair
Venture Capital, Trinity
Ventures



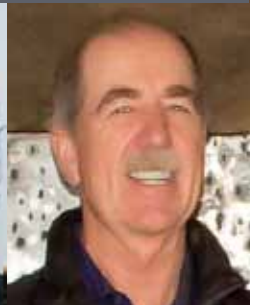
Kristin Tabor
Owner, Stumptown
Snowboards, Direc-
tor Ila B. Dousman
Fund



Ken Wessels
Board Chair
Retired, Wessels,
Arnold & Henderson



Ardy Whisler
Retired, Registered
Nurse



John Witt
Retired, COO, Bill
Matrix Corp.



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Dave Stewart 2005 - 2007

Paul Johannsen 2008 - 2010

Carol B. Atkinson 2011 - 2013

ADVISORY COUNCIL:

Harry Brown

Janice Case

Ian Collins

Connie Heckathorn

Bill Howard

Dana McGowan

Misty Scurlock

Richard Solberg

Boots Warrick

Virginia V. Weldon

OUR TEAM:

Linda Engh-Grady

President

Daria Perez

Vice President Finance and Operations

Lynnette Donaldson

Finance Assistant

Kayla Nickells

Marketing and Events

Linda Hobbs

Special Projects

Your
WHITEFISH 
COMMUNITY FOUNDATION
Giving Together Creates Impact

Office: 214 West Second Street, Suite 1

Mailing: P.O. Box 1060

Whitefish, MT 59937

406-863-1781

www.whitefishcommunityfoundation.org



Giving Together to heal our community in partnership with North Valley Hospital Foundation.



Giving Together to enrich our community through the Whitefish Review.



Giving Together to support conservation with the Bob Marshall Wilderness Foundation.



Photo courtesy Cassidy Grady

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contact@whitefishcommunityfoundation.org

Learn more about the Whitefish Community Foundation

Visit whitefishcommunityfoundation.org