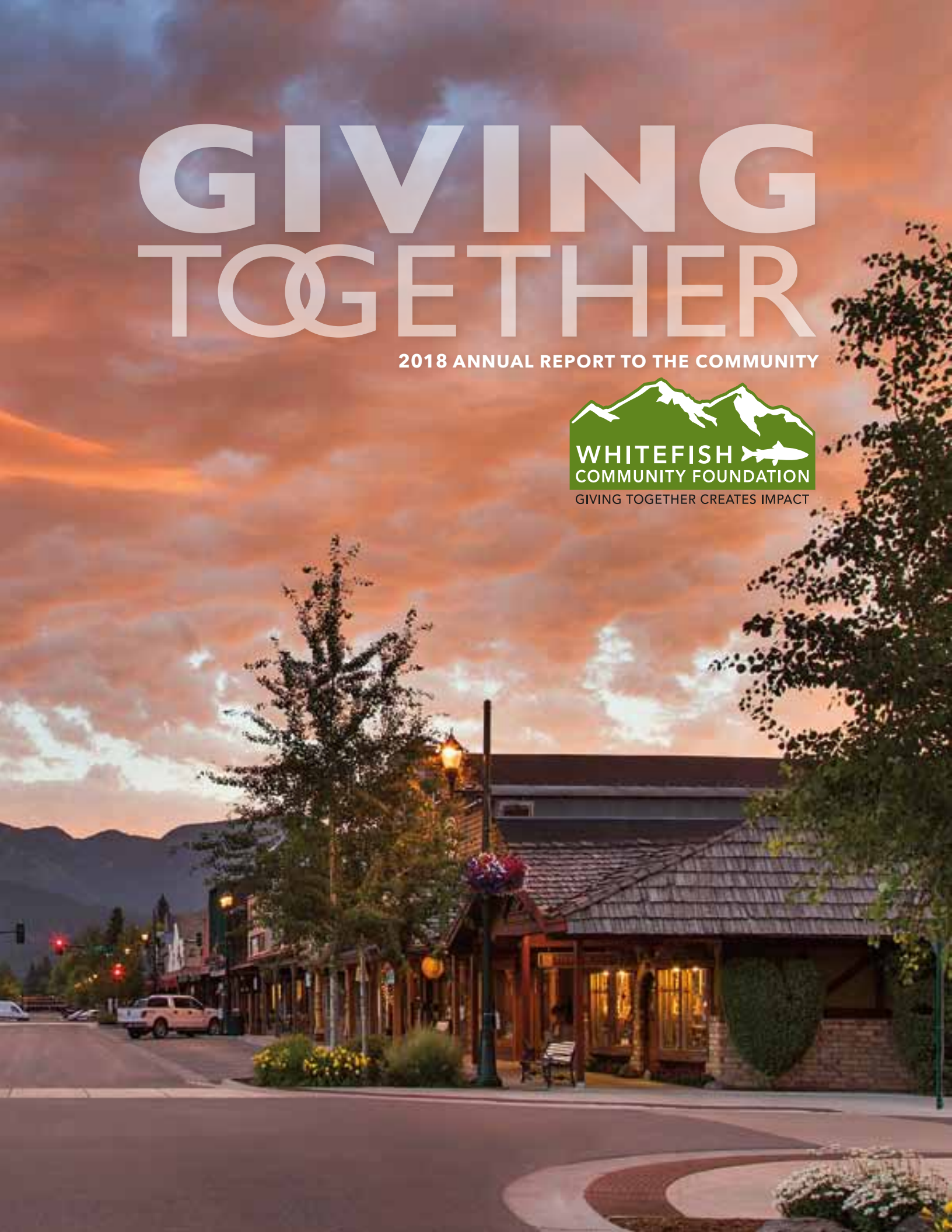


# GIVING TOGETHER

2018 ANNUAL REPORT TO THE COMMUNITY





**2018**  
ANNUAL REPORT

**MISSION**

**WHITEFISH  
COMMUNITY  
FOUNDATION**  
is Dedicated to  
Fostering Philanthropy,  
Building Endowments,  
and Helping Donors  
and Nonprofits Benefit  
our Community.



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# WHITEFISH COMMUNITY FOUNDATION



**GIVING TOGETHER  
CREATES IMPACT**



Gravity Shots



WHITEFISH  
COMMUNITY  
FOUNDATION

# GIVING TOGETHER CREATES IMPACT

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



WHERE  
GIVING  
REWARDS

## Julie and Summerfield Baldrige

*"We arrived in Whitefish from Billings in 1991. We raised our three daughters here and now enjoy watching our grandchildren thrive in the setting of this special community. The people are welcoming and the area quality of life is unbounded. These things don't just happen. There is the setting, but it's the level of community involvement and investment, small and large, that enriches our experience. It's why we love the Whitefish Community Foundation and the Great Fish Community Challenge. They do so much to raise awareness, provide assistance, and to celebrate this spirit of giving and working together. It's very rewarding for us to contribute to the fluid process of quality of life in the Flathead." -Julie and Summerfield Baldrige*

Julie and Summerfield Baldrige are avid supporters of many local charities as well as the University of Montana Foundation. Julie enjoys working with local nonprofits and currently serves on the Board of Directors for Whitefish Legacy Partners, North Valley Hospital Foundation, and the University of Montana Foundation. The Baldriges donate annually in the Great Fish Community Challenge and they are members of the Community Foundation's Circle of Giving. After learning more about the flexibility and convenience of the Foundation's Donor Advised Fund Program, they decided to become fund advisors as well.



WHERE  
GIVING  
SUSTAINS

## Kathy and Greg Garrison

*"We first visited Whitefish in 1997 on a ski trip to Big Mountain with our young kids. That introduction was amazing and we followed it up with additional ski trips and summer family reunions. Our entire family grew to love everything about Whitefish; the year round outdoor activities, the friendly people, and the strong sense of community. So, upon our retirement in 2014, it was clear to us that the perfect place to call home was Whitefish! Over the last few years we've seen all the Whitefish Community Foundation does to help make Whitefish the great hometown that it is. We joined the Circle of Giving to give back to our community and to help ensure that Whitefish continues to be our best last place!" -Greg and Kathy Garrison*

Having moved a number of times over the years, Greg and Kathy have found that getting involved with their community is a great way to "put down roots" and meet neighbors and friends. They have been strong supporters of Sparrow's Nest of NW Montana, which helps to provide unaccompanied homeless high school students with housing, enabling them to develop the personal and professional skills to graduate high school and become productive members of our community. Greg recently joined the Whitefish Community Foundation Board and, along with Kathy, they are looking forward to becoming more involved with the Great Fish Community Challenge and other community charities and activities that make Whitefish the great home town it is.



WHERE  
GIVING  
ENRICHES

## Byrdie and Ken Wessels

*"The longer we've lived in Whitefish the more we appreciate all that it has to offer. The robust giving of our community speaks volumes about the people who live here."* -Ken and Byrdie Wessels

Ken and Byrdie Wessels have been active in the Whitefish community for the past 13 years. After visiting Whitefish in 2005, they fell in love with it and decided to build a house and make it their permanent home. With a passion for flying planes, they have been supporters of Angel Flight West, as well as local nonprofits including Habitat for Humanity of the Flathead, Whitefish Community Foundation's Circle of Giving, and many others. In 2009, the Wessels opened a Donor Advised Fund with the Foundation to support their philanthropic giving, and in 2011 Ken joined the Foundation's Board of Directors. Whitefish Community Foundation was privileged to have Ken serve two years as the Foundation's Board Chair 2017-2018. He spent his tenure and focus on broadening the annual support for the Circle of Giving to help strengthen and expand the Foundation's core grant programs. Under Ken's leadership, the Foundation's Circle of Giving grew 40% to over \$700,000 annually. This in turn has expanded the impact of the Foundation's grant programs and its ability to serve more nonprofits.

## FROM THE BOARD CHAIR



**"THIS YEAR'S  
ANNUAL REPORT  
IS A STORY  
ABOUT GROWTH  
AND IMPACT."**

This year's Annual Report is a story about growth and impact. It is a testament to the generosity of our donors who made 2018 a great success for the mission of the Whitefish Community Foundation and those we serve.

Our Circle of Giving donors continued to amaze me this year. This group of dedicated individuals embody the core values of our Foundation through their personal commitment to give back. They remain the cornerstone of all our grant programs, including funding the platform and match for our Great Fish Community Challenge. The increased support from this unique group of donors allowed us to partner with several private donors and award a Major Community Grant to purchase a new bus for the Montana Veterans Home in Columbia Falls. We were also able to finalize the Smith Fields playground project as we awarded another Major Community Grant to Project Whitefish Kids. Our semiannual Community Grant Program awarded 42 local area nonprofits with smaller but no less vital Community Grants. And finally, the Circle's generosity allowed us to grow the Great Fish Community Challenge to include 50 nonprofits that raised a combined \$2.4 million to support their programs. Now that's IMPACT.

2018 also saw continued growth in the value of our Donor Advised Funds. These donors' have prioritized philanthropic giving and have come to us for the ease, flexibility, and cost effectiveness that a DAF at the Whitefish Community Foundation can provide. Many local area nonprofits benefit from our Donor's gifts, and the administrative fees support the operations of the Foundation, making us a stronger and more sustainable partner in the community.

As we look to 2019, we encourage you to add your voice to ours as we recommit ourselves to "giving voice" for our children, our neighbors in need, our pristine waters, and our public lands. Join us as we continue to enrich lives with the arts, support recreational and educational opportunities, and promote the well-being of our four legged companions. **Let's impact lives together!**

Linda Maetzold  
Board Chair  
2019-2021

## GROWING TO SERVE

<b>\$31M</b>	.....Combined Assets
<b>\$18M</b>	.....Donor Advised Fund Assets
<b>\$10M</b>	.....Endowed Assets
<b>\$6.2M</b>	.....Total Grants Awarded in 2018
<b>1,029</b>	..... Grants Awarded in 2018
<b>220</b>	.....Nonprofits Received Funding

WHERE  
GIVING  
HAPPENS

# GREAT FISH community challenge

## IMPACT STORIES



### GLACIER INSTITUTE

"Our goal at the Glacier Institute is to always say "yes" to every child that requests an educational scholarship, and we have succeeded in doing so for 36 years. The Glacier Institute feels it is vitally important that no school group leaves a child behind due to financial reasons. We continue to focus resources on underserved populations, where youth have fewer opportunities to experience their public lands. We strive to introduce students to field-based learning methods, provide curriculum-based outdoor education experience, provide opportunities to discover, learn, explore, and reflect on the science of plant and animal habitats, and encourage life-long learning. Being a part of the Great Fish Challenge for four years running has enabled the Glacier Institute to send 4,989 elementary school children to affordable, amazing science programs in the great outdoors!"

-Joyce Baltz, Executive Director, Glacier Institute

(Photo): Big Creek Discovery School students around campfire.



### CASA FOR KIDS

"In Flathead County, the rate of child abuse and neglect victims who are under the jurisdiction of the 11th Judicial District Court increased 31% between 2014 and 2018. This upward trend is continuing. To ensure children's best interests are represented and protected in court, both federal and state law require that each of these children is assigned a guardian ad litem (GAL). Since 2014, CASA for Kids has been the only source of GALs for these children, typically referred to as foster children. Our Court Appointed Special Advocate (CASA) volunteers monitor the child's psychological, emotional, educational, physical, material, safety, and permanency needs throughout the duration of the case. We are often able to match a child with a resource that they might not otherwise have.

Annually, it costs us just over \$1,200 for each child/advocate match. Last year we matched 304 children with a CASA advocate. In 2018 the Montana Supreme Court covered 8% of our budget, leaving the balance to be gathered from our community through donations and grants. The Whitefish Community Foundation was our single largest supporter, covering nearly 1/3 of our total budget for the year. Your generosity is making it possible for us to provide a CASA/GAL advocate to every foster child in Flathead County."

-Jamie Campbell, Executive Director, CASA for Kids

(Photo): CASA Advocates in training class.



### HABITAT FOR HUMANITY OF THE FLATHEAD VALLEY

"The 2018 Great Fish Community Challenge granted \$88,837.98 towards our mission. The result—over 888 square feet of safe, healthy, and affordable housing is being built. A home for a family creates a story of strength, stability, and self-reliance. It transforms their world—our world. That's our partner family's experience—their story."

-Bob Helder, Executive Director, Habitat for Humanity of the Flathead Valley

(Photo): Habitat for Humanity volunteers building 3 townhomes in Kalispell.

### BACKPACK ASSISTANCE

"The funding Backpack Assistance Program has received through the Great Fish Community Challenge has enabled our nonprofit to continue to supply an estimated 125 children weekly during the school year with nutritious food. BAP also provides a dry goods pantry at the Whitefish Middle School. Without this funding, children in need would not have the necessary food assistance on the weekends and holidays when school is not in session."

-Traci Stolte, Director, Back Pack Assistance Program

(Photo): Traci Stolte and volunteers pack bags for the holiday food bag distribution to children.



### FLATHEAD LAND TRUST

"Because of tremendous support through the Whitefish Community Foundation and over 80 partners and funders, Flathead Land Trust was able to permanently conserve the 400-acre West Valley Wetlands. The West Valley includes a complex of wetlands in agricultural fields that support some of the highest numbers and diversity of wetland birds in the Flathead Valley. This includes the only known staging area for sandhill cranes in the Flathead Valley, where hundreds of these magnificent birds can be viewed during their annual migration.

Flathead Land Trust joined with the Grosswiler and Marvin families to conserve this critical area and provide for a public viewing area. In partnership with Montana Fish, Wildlife and Parks and support through the Great Fish Community Challenge, we completed the public bird viewing area at the West Valley Wetlands, which includes an improved access road, parking, and interpretive signs. The new viewing area is a positive way to accommodate the increasing demands for safe and easily accessible wildlife viewing opportunities for all ages. Our educational programs will connect local students to this ecological treasure by offering field trips at the bird viewing area."

-Paul Travis, Executive Director, Flathead Land Trust

(Photo): Sandhill Cranes Flying over West Valley Pothole Wetlands.



Steve Muller



## CHILD BRIDGE

"The Great Fish Community Challenge is an invaluable partner in changing the lives of the over 200 local children who are in foster care because of abuse and neglect. Your support allowed us to expand our proven model of foster family recruitment in Whitefish and the Flathead Valley. When children heal from trauma in families, it creates a positive impact for the entire community. The Great Fish attracts a variety of new supporters, lowering our fundraising costs...meaning more for the mission of finding families to care for our most valuable resource, our children!"

-Mary Bryan, *Cofounder/Mission Advancement Director, Child Bridge*

(Photo): When permanency is needed, Child Bridge families overwhelmingly adopt children in their care—like the little fellow on the right!



## WHITEFISH LAKE INSTITUTE

"The Great Fish Challenge has enabled the Whitefish Lake Institute and our project partners—the City of Whitefish and Montana State Parks—to deliver an Aquatic Invasive Species (AIS) Prevention and Decontamination Program with fully trained and outfitted personnel for the protection of Whitefish Lake. This program allows us to provide staff training, management, and equipment consistent with Montana state protocols. It is the last line of defense in protecting our human, economic, and environmental health from the potentially devastating effects of an AIS infestation."

-Lori S. Curtis, *Science & Education Director, Whitefish Lake Institute*

(Photo): A member of the Whitefish Lake Institute 2018 Prevention and Decontamination Station staff preparing a boat for a decontamination.



## SHEPHERD'S HAND FREE CLINIC

"Shepherd's Hand was founded on the desire to provide medical care for people in our community who are underserved. Over the past 23 years, we have continually assessed gaps in services and adapted to meet current needs. While beginning as an acute care clinic, we identified many individuals with chronic health issues, and we have served as their primary health-care home. With the addition of a weekly community meal, dental services, acupuncture, and chiropractic care, we continue to assess and shape services that will enhance health and well-being for those in need. Our current initiatives involve helping to connect the people coming through our doors to all the resources that are available and assessing additional opportunities to promote individual and community well-being more holistically. The Whitefish Community Foundation, through the Great Fish Challenge and management of endowment funds, helps us to cultivate donor relationships and all of this fosters our long-term sustainability. This allows us to focus our energy on current programs and developing future opportunities."

-Jennifer Hyatt, *Executive Director, Shepherd's Hand Free Clinic*

(Photo): Dr. Michael Bowman and Dental Assistant Emily Newsome, CDA with Kalispell KiDDS provide free dental services to a Shepherd's Hand patient.

## TOTAL RAISED

BY EACH NONPROFIT PARTICIPATING  
IN THE 2018 GREAT FISH COMMUNITY  
CHALLENGE INCLUDING THE MATCH.

• Abbie Shelter .....	\$71,215
• Alpine Theatre Project .....	\$45,660
• Backpack Assistance Program .....	\$46,358
• Big Brothers Big Sisters of Flathead Cnty....	\$22,071
• Bob Marshall Wilderness Foundation.....	\$35,438
• CASA For Kids .....	\$118,850
• Center for Restorative Youth Justice.....	\$37,380
• CF-WF HS Swim Teams.....	\$16,108
• Child Bridge .....	\$137,270
• DREAM Adaptive Recreation .....	\$36,033
• Farm Hands—Nourish the Flathead.....	\$37,690
• Flathead Cancer Aid Services .....	\$20,201
• Flathead Food Bank .....	\$34,270
• Flathead Land Trust .....	\$41,035
• Flathead Rapids Youth Soccer .....	\$21,198
• Flathead Shelter Friends .....	\$25,919
• Flathead Ski Education Foundation .....	\$32,920
• Flathead Youth Home .....	\$35,115
• Friends of the Flathead Avalanche Center...	\$38,462
• FVCC Foundation.....	\$105,120
• Glacier Institute.....	\$40,093
• Glacier National Park Conservancy.....	\$75,675
• Glacier Nordic Club .....	\$33,850
• Glacier Symphony and Chorale.....	\$39,630
• Habitat for Humanity of Flathead Valley.....	\$89,162
• Humane Society of NW MT .....	\$110,393
• Intermountain Children's Services.....	\$33,655
• Nate Chute Foundation.....	\$37,747
• North Valley Hospital Foundation .....	\$62,794
• North Valley Music School .....	\$88,731
• NW Montana Veterans Stand Down .....	\$42,260
• Project Whitefish Kids .....	\$61,541
• Ravenwood Natural Science Center .....	\$19,043
• Samaritan House .....	\$38,290
• Shepherd's Hand Free Clinic.....	\$74,165
• Sparrows Nest of NW Montana.....	\$59,095
• Stumptown Art Studio.....	\$28,976
• Tamarack Grief Resource Center.....	\$36,955
• The Wave Aquatic and Fitness Center.....	\$8,705
• WAG—Whitefish Animal Group.....	\$30,300
• Whitefish Community Center .....	\$18,754
• Whitefish Education Foundation.....	\$32,181
• Whitefish Firefighters Association.....	\$23,463
• Whitefish Lake Institute .....	\$58,394
• Whitefish Legacy Partners.....	\$109,369
• Whitefish Review .....	\$30,412
• Whitefish Rotary Charitable Fund .....	\$22,167
• Whitefish Sports Facility Foundation .....	\$15,357
• Whitefish Theatre Company .....	\$59,310
• Whitefish Veterans Support Team .....	\$35,630



## WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

**THE GREAT FISH COMMUNITY CHALLENGE** supports local nonprofits with an efficient fundraising opportunity that inspires greater giving and participation from community donors. It brings local nonprofits together in a single high-profile, collectively beneficial event. Each charity receives designated gifts, and has the opportunity for matching grants from the Great Fish Match Fund. In just four years running, the Great Fish Community Challenge has raised over \$7 million for more than 55 local charities.



**GREAT FISH TOTAL**—Board of Directors announce the total amount raised in the 2018 Great Fish Community Challenge.

### 2018 GREAT FISH COMMUNITY CHALLENGE FACTS BY THE NUMBERS:

**\$7M**.....Total raised through the Great Fish Community Challenge over 4 years

**\$2.4M**.....Raised in the 2018 Great Fish Community Challenge

**\$1.46M**.....Amount of total raised provided by WCF matching and incentive grants over 4 years

**12,391**.....Total number of gifts given through the Great Fish Community Challenge over 4 years

## WHERE GIVING RESTORES

# COMMUNITY GRANT PROGRAM IMPACT STORIES

## KATY BRANSTON FUN FUND

Friends and family of Katherine A. "Katy" Branston, in partnership with the Whitefish Community Foundation, awarded a one-time \$5,000 grant in memory of Katy.

**KATY BRANSTON** Originally from Memphis, Tennessee, Katy found her way to Whitefish by way of Missoula. Although she occasionally let slip a Memphis twang that reminded us where she was from, Katy's fervent embrace of all things Montana was a testament to where she belonged. Of all her accomplishments, none was greater than Katy's dedication to community service, particularly that which benefited Montana's youth. Following her time as a counselor at a youth home and Youth Development Coordinator at Missoula's Hawthorne Elementary Flagship program, she landed at Habitat for Humanity of Flathead Valley, coordinating volunteers and events. Katy's passion was making people feel welcome in the world through positive, inclusive action.

The Whitefish Community Foundation Grants Committee and Katy's friends and family selected Whitefish Legacy Partner's Girls on the Trail program to honor Katy's legacy. The Girls on the Trail program leads girls, ages 12-14, in a hiking, mountain biking, and trail stewardship program.

(Photo top to bottom):

**Katy Branston** enjoying one of her favorite activities—mountain biking!

New friendships being created between participants of the first year of the **Girls on the Trail** program.

## NORTHWEST MONTANA FOREST FIRE LOOKOUT ASSOCIATION

In 2018, the Northwest Montana Chapter of the Forest Fire Lookout Association (NWMT-FFLA) was awarded a Community Grant to help restore and stabilize Huckleberry, Mount Brown, and Scalplock fire lookout towers. Mount Brown and Scalplock are historic structures, built in 1928 and 1931; Huckleberry was rebuilt in 1968 after the historic lookout at that site was destroyed by wildfire. All sit at greater than 6500 feet in elevation, presenting challenges for maintenance and restoration. Detailed assessments were completed in 2017 to determine the needs of each lookout, and to prioritize and develop long-range work plans. 2018 projects improved the condition of all three lookouts to ensure their integrity in harsh winter conditions. A 2-3 person NWMT-FFLA volunteer crew plus a leader hiked 4.5-6 miles up to the lookout site, and camped at the lookout for 10 days to complete each project.



Volunteers work on Mud Lake Lookout.



Brenda Ahearn/Daily Interlake

## BIG MOUNTAIN FIREFIGHTERS

On November 2, 2017, the Big Mountain Fire Department experienced the largest structure fire since the creation of the district in 1974. A condo building was completely engulfed in flames. The experience of fighting this fire brought to light the need for a significantly larger diameter hose that would allow better water flow capacity and increased efficiency to help suppress fires. Whitefish Community Foundation Grants Committee realized the critical need for the larger hose and funded the full cost of the hose for \$3,805 from the Community Grant Program.

(Photo): **Big Mountain Firefighter** Kevin Wise working to put out the fire at a Slopeside condo at Whitefish Mountain Resort in 2017.

## A RAY OF HOPE

A Ray of Hope provides a safe harbor for those in the community with nowhere else to turn. Montana is in the top five states for indigent individuals and 35% of the homeless are families with children. The shelter received a Community Grant for the new women and children's shelter which will begin the process of changing lives while keeping families together. The women and children's shelter will allow A Ray of Hope to accommodate 50% more individuals and help an additional 500+ people annually.

(Photo): Volunteers working on the new A Ray of Hope women and children's shelter.



## FROM THE GRANTS COMMITTEE CHAIR



"As the incoming Chair of the Grants Committee, I have the amazing opportunity to help facilitate and nurture the relationship between this vibrant community, our generous donors, and the inspiring nonprofits that are essential to creating our unique sense of place.

A significant part of our role as a Foundation is to continually assess our impact on the community, our overall goals, and how to best support the hard work and missions of the nonprofits who apply to the Foundation for financial and program support. The monumental growth of our granting programs has required the grant committee to hone our approach to reviewing the grants and the organizations that apply to the Foundation. This can be a difficult process at times, but we are excited to have the opportunity to help the diverse nonprofits in our community achieve new levels of long term viability and to give them the space and ability to expand their achievements and long-term vision."

-Monica Pastor

### GRANTS COMMITTEE

Monica Pastor, *Chair*  
 Doug Reed, *Co-Chair*  
 Jeff Allen  
 Carol Atkinson  
 Betsy Bayne  
 Sherry Lesar  
 Linda Maetzold  
 Ellen Moran  
 Tom Quinn  
 Kristin Tabor  
 Shawn Watts

**WHERE  
GIVING  
IMPROVES**

**COMMUNITY  
GRANT PROGRAM**

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

**\$3.7M** ..... Total amount awarded through all WCF Grant Programs since inception in 2000

**\$1.65M** ..... Total amount awarded from the Community Grant Program since inception in 2000

**\$71,000** ..... Awarded from the 2018 Community Grant Program

**COMMUNITY GRANT RECIPIENTS**

- A Ray of Hope-Capital support for new women and children's shelter.
- Big Mountain Firefighters Association-Purchase of a large-diameter fire hose.
- Blackfeet at HeART-Art supplies and programs for the Blackfeet Nation.
- Casting for Recovery-Support fly fishing retreat for breast cancer survivors.
- Children's House Montessori School-Scholarship program for families in need.
- City of Whitefish Parks and Rec-Youth scholarships to Parks and Recreation programs.
- Climate Smart Glacier Cntry-Increase citizen ownership & engage visitors in climate action solutions.
- Family Forestry Expo-Support workbook printing for Family Forestry Expo.
- Flathead Area Mountain Bikers-Free youth mountain bike skills clinics.
- Flathead Audubon Society-Expand education and stewardship of natural resources program.
- Flathead Nordic Backcountry Patrol-High visibility outerwear for search and rescue patrollers.
- Gateway to Glacier Trail-Columbia Falls River Trail construction.
- Girls on the Run Flathead Valley-Support programs and scholarships serving Flathead Valley.
- Groovetrail-Live music performances for rehabilitation centers and nursing homes.
- Hockaday Museum of Art-Support art and cultural education through school memberships.
- Human Therapy on Horseback-Family scholarships for accredited therapy program.
- Lighthouse Christian Home & Services-Renovate home to support equal ratio of men and women.
- Montana Conservation Corps-Landscape Roundhouse Landing and maintain Fish Trails bike path.
- Montana Equestrian Events-Outreach materials for Halt Cancer at X.
- Montana Kayak Academy-River/lake recreation and skills education programs.
- North Valley Food Bank-Provide fresh fruit and vegetables to food bank patrons.
- NW Montana Forest Fire Lookout Assoc.-Restore and stabilize historic Glacier Park lookout towers.
- Riding On Insulin-Ski/snowboard and bike camps for children with Type I Diabetes.
- The Patrol Fund-Develop Whitefish Avalanche Rescue Dog Program at Whitefish Mountain Resort.
- Vital Ground Foundation-Acquire 18 acres of grizzly bear habitat in Purcell and Cabinet Mountains.
- Whitefish Chamber of Commerce-Independence Day Whitefish Lake Fireworks Display.
- Whitefish Community School-Replace entrance deck to improve accessibility.
- Whitefish Freestyle Inc.-Scholarship program for Flathead Valley skiers and snowboarders.
- Whitefish Library Association-Computer upgrade for MT State Library and shared catalogue.
- Whitefish Performing Arts Center-Inspection and maintenance of theater electronic rigging system.
- Whitefish Shines-Reupholster vintage red holiday bells for Whitefish holiday decorations.
- WWC-Whitefish Winter Carnival-Vehicle capable of towing Whitefish Carnival float and trailer.



**THE PATROL FUND**

"I found you!" The view from a snow cave as Jett and handler Lloyd Morsett uncover a buried victim in a search drill.



**FLATHEAD AREA MOUNTAIN BIKERS** pump track in Whitefish with riders.

**MAJOR  
COMMUNITY  
PROJECT  
GRANTS**

**\$559,000** Awarded since program began in 2010

**18** Major Grants of \$10,000 or more have been awarded to capital projects benefitting our community. Projects in the area of water conservation, health and human services, arts and culture, and more have greatly benefitted from a Major Community Project Grant.

**\$117,500** grant to **MONTANA VETERANS HOME** for the purchase of a new wheelchair-accessible bus.

The Veterans Home's older 12 passenger bus is used to transport residents to a variety of off-site activities and excursions. It is heavily used for trips all year and it has been breaking down a lot. Long-time Montana Veterans Home volunteer Dianna Bennett decided to lead the effort to raise the funding for a new bus.

When donors of Whitefish Community Foundation read about the campaign to raise funds for the new bus, they decided this was a project with serious merit and put out a challenge to other donors within the Foundation to raise the funds. In the end, Whitefish Community Foundation awarded \$25,000 to help match funds from seven Donor Advised Funds. Donors including Ardy and Steve Whisler, Janna and Jamie Shennan, Byrdie and Ken Wessels, Carol and Richard Atkinson, John Kramer, Bill and Betsy Bayne, and an anonymous donor, awarded a total of \$117,500 for the bus. Long-time volunteer Diana Bennett's fundraiser brought in \$20,000 which made the new \$135,000, 14 passenger and wheelchair-accessible bus a reality for veterans.



Bob Olson beside the Montana Veterans Home's new ADA accessible bus.

**\$25,000** grant to **PROJECT WHITEFISH KIDS** to finish the playground and pavilion at the Smith Fields Youth Sports Complex.

Project Whitefish Kids maintains the entire complex through user fees and private donations, and has been working diligently for three years to raise the \$292,000 necessary to replace the wooden playground, originally funded by donors of the Whitefish Community Foundation, with safe, ADA-accessible equipment. "We have watched PWK put in a lot of time and work to secure the necessary funding for this community project," said Linda Engh-Grady, Foundation President. "PWK is comprised of very dedicated volunteers that should take pride in the asset they have built for our community," she said.

Project Whitefish Kids raised \$51,000 through the Great Fish Community Challenge and received the maximum match of \$10,200 from the Community Foundation but much of these funds will go to the maintenance of the grounds and equipment at Smith Fields, a 55-acre complex. The Major Grant will help Project Whitefish Kids finish the playground and build the pavilion without jeopardizing their operating funds used for the upkeep of eight soccer/lacrosse pitches, 5 baseball fields and 4 softball fields. The new playground will be installed this fall, and the pavilion will be completed in the spring.



**SMITH FIELDS PLAYGROUND**  
In the playground's first winter, the playground is already being used by kids and adults alike!



**WHERE  
GIVING  
MULTIPLIES**



**DONOR  
ADVISED  
FUNDS**

**ENGAGE YOUR FAMILY  
GIVE WITH FLEXIBILITY  
GIVE WITH CONFIDENCE**

A **DONOR ADVISED FUND** offers individuals and families the ease and flexibility of giving, similar to a private foundation, but without all the expense and administration.

**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.
- You are able to contribute to this fund as often as you would like to grow your fund.
- You recommend grants from your Donor Advised Fund to all of your favorite 501(c)(3) charities **no matter where they are located.**
- We offer online fund access and online grant submissions so that you can access your fund, check your balance and investment performance, and recommend a grant from anywhere you are located.
- An administrative fee of .60% or less is charged annually.
- We offer several investment options so your gift can grow tax free and you can take your time deciding which organizations to recommend grants to.
- You can name your fund after yourself, your family, or any name you choose. You can also be completely anonymous in your giving or choose to be recognized for your generosity.
- You will have access to information about the current and important needs within the community.
- The Community Foundation will take care of all the due diligence in all your grant making.



**SPARROW'S NEST  
OF NW MONTANA**  
A resident of Sparrow's Nest graduates. (Graduating student with Sparrow's Nest staff)

The Whitefish Community Foundation's **DONOR ADVISED FUND PROGRAM** lets you simplify your charitable giving. You streamline your accounting and tax implications while focusing on your passions. Using the Community Foundation as your charitable partner allows you to be in touch with where your money is needed most. You can give to all the charities you care about and the small administrative fee you pay the Foundation to administer your fund stays here to benefit your community. If you want to be philanthropic, a donor advised fund is right for you.

**100%** of your gifts go to charitable causes—even the administrative fees which support the work of the Whitefish Community Foundation.

**DONOR ADVISED FUNDS in 2018:**

**\$21.6M** ..... Total Awarded from Donor Advised and Designated Funds since inception in 2000

**\$18M** ..... Donor Advised Fund Assets

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



**VITAL GROUND**  
Conserves grizzly and other wildlife habitat. (Drone shot of the Wild River in the Cabinet–Yaak Ecosystem.)



Gravity Shots

# WHERE GIVING CREATES

## MOUNT REYNOLDS SUMMIT

Anonymous  
Mary Jane and Russ Street\*

## GREAT NORTHERN SUMMIT

Carol and Richard Atkinson  
Cindy and Mogens Bay  
Janice and Jim Case  
Sarah and John Graves  
Bill Howard  
John Kramer  
Doris Schumm\*  
Byrdie and Ken Wessels  
Ardy and Steve Whisler

## BIG MOUNTAIN SUMMIT

AGL Foundation  
Anonymous (1)  
Teri and Jeff Allen  
BNSF Railway Foundation  
Betsy and Bill Bayne  
Anne and John Collins  
Debbie and Robert Douglas  
First Interstate Bank  
Glacier Bank  
Michael Goguen  
Cindy and Joe Gregory  
Shannon and Brian Haycox  
Michael Honkamp  
Ila B. Dousman Fund  
Barbara and Mike Jenson  
Ann and Paul Jeremiassen  
Mignon and Jay Latimer  
Teresa and Tom Quinn  
Schlinger Family Foundation  
David Stewart  
Lisa and Alan Stinson  
Boots and Alan Warrick

\*Deceased

# CUMULATIVE GIVING

## COMMUNITY IMPACT 2000–2018

### CUMULATIVE GIVING REPORT REPRESENTS GIVING OVER A LIFETIME DIRECTLY TO WHITEFISH COMMUNITY FOUNDATION PROGRAMS

"Ten years ago, I began my tenure with the Foundation when it was still in its beginning stages of growth. Today, thanks to the individuals listed on the Cumulative Giving Report and so many more on the Donor Report pages 34 and 35, the Foundation awards over \$600,000 annually through competitive grant programs, Major Grants, and matching grants in the Challenge. We are grateful to all our donors who have partnered with us to address community needs and make good things happen in our community. Working together we can solve serious problems and create lasting change. Thank you!"

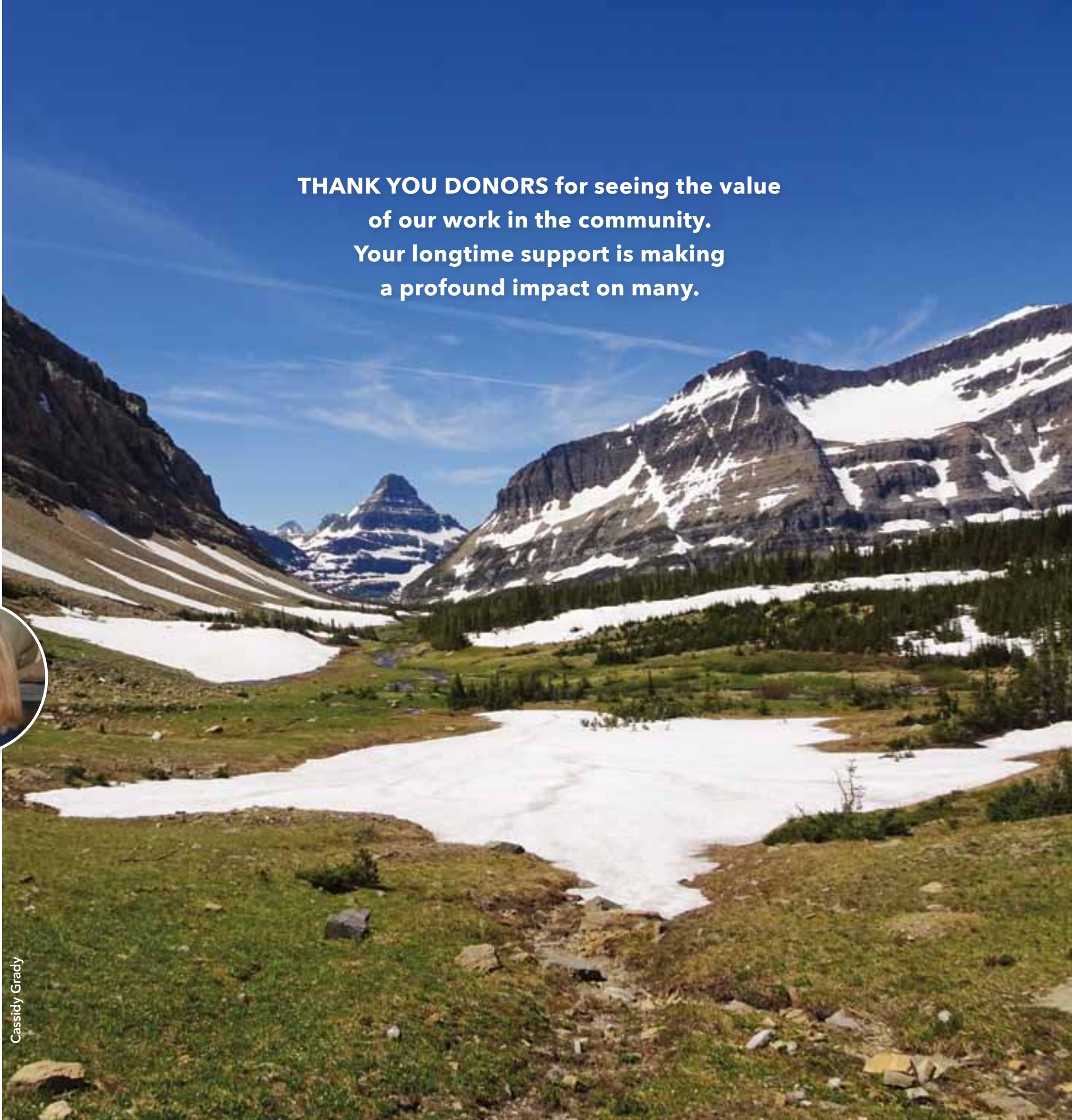
-Linda Engh-Grady  
*President,*  
*Whitefish Community Foundation*



**This page recognizes some very dedicated donors whose cumulative giving over the past ten or more years has made an extraordinary impact on the work of Whitefish Community Foundation and on our community.**

(Photo) Linda Engh-Grady

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



Cassidy Grady

WHERE  
GIVING  
INSPIRES



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

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

## CIRCLE OF GIVING

**THE CIRCLE OF GIVING** is a group of philanthropic individuals giving together to make good things happen in our community. In the past five years, Whitefish Community Foundation's Community Grant Programs have grown by 59%, from awarding \$362,000 in 2014 to \$610,000 in 2018. This tremendous growth is attributed to the generosity of our Circle of Giving donors. Thank you for what you do to support so many important and critical needs in our community.

Anonymous (3)  
AGL Foundation  
**Teri and Jeff Allen**  
**Carol and Richard Atkinson**  
Julie and Summerfield Baldrige  
Sharon and Dean Baltzell  
**Cindy and Mogens Bay**  
**Betsy and Bill Bayne**  
Dee and Jim Beightol  
Mary Ann and Bill Bindley  
Sandy and Dick Boyce  
Beth and Jerome Broussard  
**Rockwood Brown, In Memory of Marilyn Brown**  
Dorothy and Luther Campbell  
Eileen Bocci Campbell  
**Janice and James Case**  
Karen and Nick Chickering  
Jane Kollmeyer and Terry Chute  
Anne and John Collins  
Linda Cornutt  
**Debbie and Robert Douglas**  
**Ila B. Dousman Fund**  
**Barbara and Mike Gallagher**  
Kathy and Greg Garrison  
Caeli Quinn and Denny Gignoux  
Cheryl Watkins and Dick Gordon  
Linda Engh-Grady and Dave Grady  
Colleen and Peter Grant  
**Sarah and John Graves**  
**Cindy and Joe Gregory**  
Jes and John Hagale  
Rachael and Graham Hairston  
Mary Lloyd and Richard Harding  
Stephanie and Fred Harman  
Mary Ann and Fred Hawkins  
Shannon and Brian Haycox  
Patty and Bob Hayes  
Kristin and Greg Hetzer  
**Bill Howard**

Iron Horse Foundation  
**Barbara and Mike Jenson**  
**Ann and Paul Jeremiassen**  
Maureen and John King  
**John Kramer**  
**Mignon and Jay Latimer**  
Sherry and David Lesar  
Linda and Charlie Maetzold  
Allison and Rick Magnuson  
Janet Mayo  
Maureen and Marlin McKeever  
Lori Miller  
Ellen and Matt Moran  
Barbara Morris  
Rosie and Myron Noble  
Allison and Doug O'Briant  
**Teresa and Tom Quinn**  
Nikki and Doug Reed  
Sue and Hank Ricklefs  
Karen and Ron Rosenberg  
Leanne Schlinger  
Stacy Schlinger  
Shirley and Mark Schmidt  
**Janna and Jamie Shennan**  
Carole and Roger Spragg  
Lisa and Alan Stinson  
Nancy and Dave Stokes  
Jill and James Stroud  
Linda and Andy Viens  
**Lori and Robb Voyles**  
Dorie and Bill Walton  
**Boots and Alan Warrick**  
**Linda and Stephen Wendfeldt**  
**Byrdie and Ken Wessels**  
**Ardy and Steve Whisler**  
Judy and Dave Williams  
Mary and Hal Williamson  
Bet and Doug Wise  
**Susan and John Witt**



Dick Walker

Sandhill cranes silhouetted during sunset at the recently conserved West Valley Wetlands. Conservation work through the **Flathead Area Land Trust**.

## CIRCLE OF GIVING

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

**\$734,000** ..... Circle contributions in 2018 directly benefitting community grant programs  
**95%** ..... Circle of Giving contributions that directly benefit the community grant programs  
**5%** ..... Directly benefits the operations of Whitefish Community Foundation allowing it to perform its mission  
**\$5,000** ..... Minimum gift to join the Circle of Giving

We encourage you to join this extraordinary group that is the backbone of the  
**GREAT FISH COMMUNITY CHALLENGE**

## SPECIAL AWARDS

The Whitefish Community Foundation recognizes the work of outstanding nonprofits each year with special awards that also pay tribute to the memory of special individuals we have lost. The nonprofits are selected for their dedication, and most importantly, their impact on enriching our community as a whole.

### GREAT FISH AWARD

**NORTH VALLEY MUSIC SCHOOL** received the **Great Fish Award** for the significant benefit they provide to all in our community and their remarkable participation, commitment, and enthusiasm in the Great Fish Community Challenge. They brought much awareness to the campaign, which not only benefitted their goal but also all the other nonprofits involved. This award comes with a \$5,000 grant.

*(Circle photo):* Executive Director of the North Valley Music School Deidre Corson proudly holds the Great Fish Award presented to her by Board Chair Ken Wessels.

*(Photo below):* North Valley Music School holding the Great Fish Award.



### OTHER AWARDS

**OUTSTANDING VOLUNTEER AWARD:** Don Bestwick, \$2,500 grant awarded in his honor to Abbie Shelter

**CORPORATE CITIZENSHIP AWARD:** ZaneRay Group, \$2,500 grant awarded to Flathead Cancer Aid Services

**BIGGEST CATCH AWARD:** (most donations in the Great Fish Community Challenge)—Awarded to Whitefish Legacy Partners \$2,500

**MIC DROP WINNER ERIC KANTER:** \$1,000 grant awarded to Nate Chute Foundation



Flathead Rapids Youth Soccer program summer youth camp.



Alan Satterlee and Pam Ellis of North Valley Hospital Foundation with the Russ and Mary Jane Street Community Service Award.



Steve Howard presents the Jean Howard Memorial Award to Cora Arnold and Marcie Jackson of the Flathead Cancer Aid Services.

## DORIS SCHUMM COMMUNITY SPIRIT AWARD

**FLATHEAD RAPIDS YOUTH SOCCER** received the **Doris Schumm Community Spirit Award** for their outstanding work benefiting the youth soccer programs in the Flathead. The Rapids welcome players of all abilities and provide high quality opportunities to players at all developmental levels.

Doris Schumm was a dear friend to the Whitefish community and the Whitefish Community Foundation. Her bequest to the Foundation from her charitable remainder trust in 2011 established the Doris Schumm Community Spirit Award. Now in its 6th year, the special award recognizes an organization that embodies the spirit for community that Dorie embraced. This special honor comes with a \$2,500 grant.

## RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD

**NORTH VALLEY HOSPITAL FOUNDATION** received the **Russ and Mary Jane Street Community Service Award** for their overall efforts to promote health and wellness, and for providing high quality healthcare to our community.

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

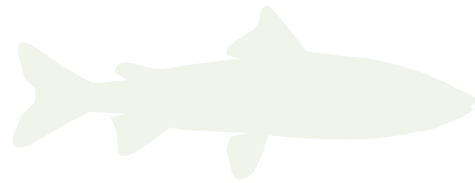
## JEAN HOWARD MEMORIAL AWARD

**FLATHEAD CANCER AID SERVICES** received the **Jean Howard Memorial Award** because of their work to support and encourage individuals impacted by cancer in our community. They provide funding for basic, everyday expenses so that patients and their families can focus on treatment and healing.

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

# WHERE GIVING GROWS

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



## 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 education, awareness, and grant programs. 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:

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

#### AGENCY ENDOWMENT FUNDS

**28** .....Permanent endowment funds working for nonprofits today and building sustainability for tomorrow

**\$269,566** .....Grants distributed from endowments to nonprofits in 2018

**\$354,166** .....Gifts to endowments in 2018

**\$1,675,272** .....Total distributions from endowment funds since program inception in 2004

#### THE 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.

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 [whitefishcommunityfoundation.org](http://whitefishcommunityfoundation.org).



## NORTH VALLEY FOOD BANK

"North Valley Food Bank thrives in part by the strength of our Whitefish Community Foundation endowment. The stability the fund offers us helps ensure a viable and sustainable future. This stability allows us to purchase highly nutritious foods, including meat, fresh produce, and whole grains that nourish our most vulnerable neighbors. No person in Whitefish should ever experience hunger. We are one monumental step closer to ensuring food security and this is a reality because of the incredible generosity of our community."

-Jessy Lee, Executive Director of North Valley Food Bank

(Photo): Boxes of food ready for distribution at the North Valley Food Bank.



## NORTH VALLEY MUSIC SCHOOL

"Music has changed and enriched lives and our community for decades. Endowment funds ensure the sustainability of our organization so we may fulfill our mission long into the future and continue to turn no child away for financial shortcomings. NVMS is grateful to the knowledgeable and professional staff at Whitefish Community Foundation that manage our endowment funds. Our donors can give confidently knowing their generosity will pass on the gift of music for years to come."

-Deidre Corson, Executive Director of North Valley Music School

(Photo): Participants in North Valley Music School's Camp Amadeus.



## WHITEFISH LEGACY PARTNERS

"The Whitefish Trail Endowment safeguards the long-term health of our community trail system for now and future generations, ensuring that families of the Flathead Valley can forever enjoy free recreation access to our local lands. Revenue produced by the endowment is restricted to support Whitefish Trail annual maintenance tasks including trail tread work, sign replacement, trailhead maintenance, access road repair, snowplowing, and toilet pumping. The Whitefish Community Foundation's expert management of the WT Endowment Fund ensures sustainable growth of the principal and a reliable disbursement every year. Whitefish Legacy Partners, the City of Whitefish, and all the Whitefish Trail users are extremely thankful for the partnership with the Community Foundation."

-Fred Jones, Board President, Whitefish Legacy Partners

(Photo): The Whitefish Walkers take in the brilliant fall colors from the Skyles Lake Overlook at Lion Mountain.

## WHERE GIVING INVESTS

## BRIGHTER FUTURES 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.

In 2018, Glacier Restaurant Group awarded \$7,000 in scholarships to four different recipients in various stages of their higher education paths. The GRG R.I.S.E Scholarship stands for Restaurant Industry Scholarship Endowment, and is administered by the Whitefish Community Foundation. Applicants are chosen based on academic performance, their drive to achieve their goals, and their commitment and involvement in their communities. Application is open to all employees and the children of employees that work for eligible Glacier Restaurant Group restaurants across the country.

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

### 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 education opportunities, regardless of their financial situation

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



BARRETT GRAY

Barrett Gray attends Princeton University and is studying Ecology and Evolutionary Biology with a minor in Environmental Studies. She hopes to use her degree to advance conservation efforts for important ecosystems around the world and to help reduce negative human impact on the environment. Her outdoor enthusiasm stems from her involvement with the Whitefish Lake Institute as a volunteer and intern.



NICOLE SHARKEY

Following her undergraduate degree from Temple University, Nicole Sharkey had the opportunity to live abroad in Ulsan, South Korea. Having received a master's degree from The George Washington University in Security Policy Studies, she hopes to deepen her understanding of how conflict resolution strategies intersect with international security policies and to serve her country as a U.S. Foreign Service Officer.



DANIELLE PACE

After graduating from Eastern Washington University with a BS in Biology and a minor in Health Science, Danielle Pace hopes to become a surgical technologist through the Surgical Technology program at the University of Montana. She plans to take her national boards to become certified as a surgical technologist in the upcoming year, and will begin her practice directly following.



JULIA SCHMIDT

Currently, Julia Schmidt is attending Edinboro University of Pennsylvania, majoring in Early Childhood and Special Education. Her goal following university is to bring high quality education and authentic learning to children in low-income areas. Julia is also certified in STEM education—a curriculum based in four specific disciplines—science, technology, engineering, and mathematics.

## GIVING BACK TO OUR COMMUNITY

### WHITEFISH MOUNTAIN RESORT

- \$1M** ..... Awarded to benefit local nonprofits since program inception in 2002
- \$105,800** ..... Supported local nonprofits in 2018
- 57** ..... Grants awarded to local nonprofits in 2018
- 46** ..... Number of Patron Passes sold each year to benefit charities

The **PATRON SKI PASS PROGRAM** is a partnership between Whitefish Mountain Resort and Whitefish Community Foundation. Proceeds from the sale of passes each year benefit the work of local nonprofits and the mission of Whitefish Community Foundation. The program makes possible the free ski pass program for 5th grade students each year, and it is a major source of funding for the DREAM Adaptive Recreation program supporting the adaptive skiing program for people with disabilities.

The Patron Ski Pass Program provides annual support to many local charities. Thank you Patron Ski Pass holders and Whitefish Mountain Resort for your continued support for our community!



David Marx

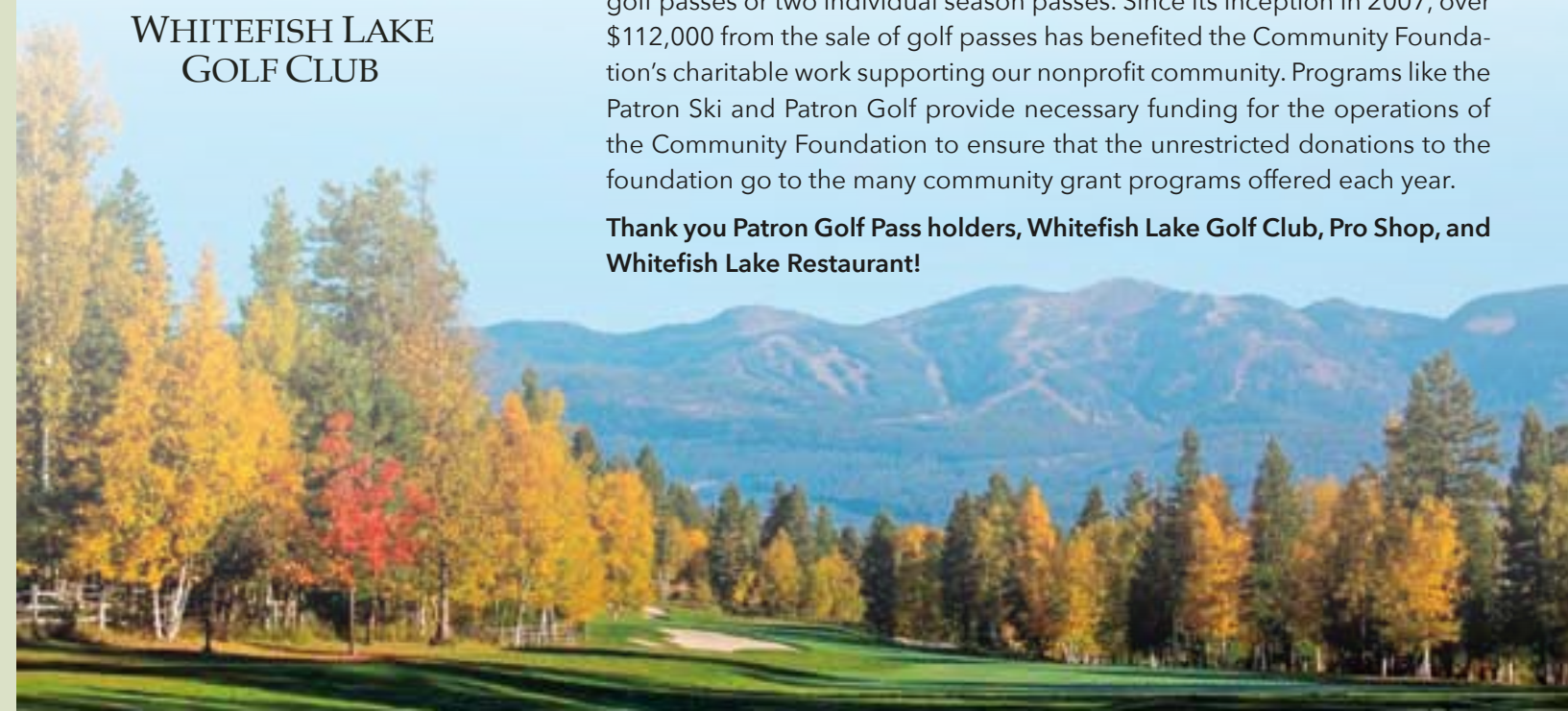


### WHITEFISH LAKE GOLF CLUB

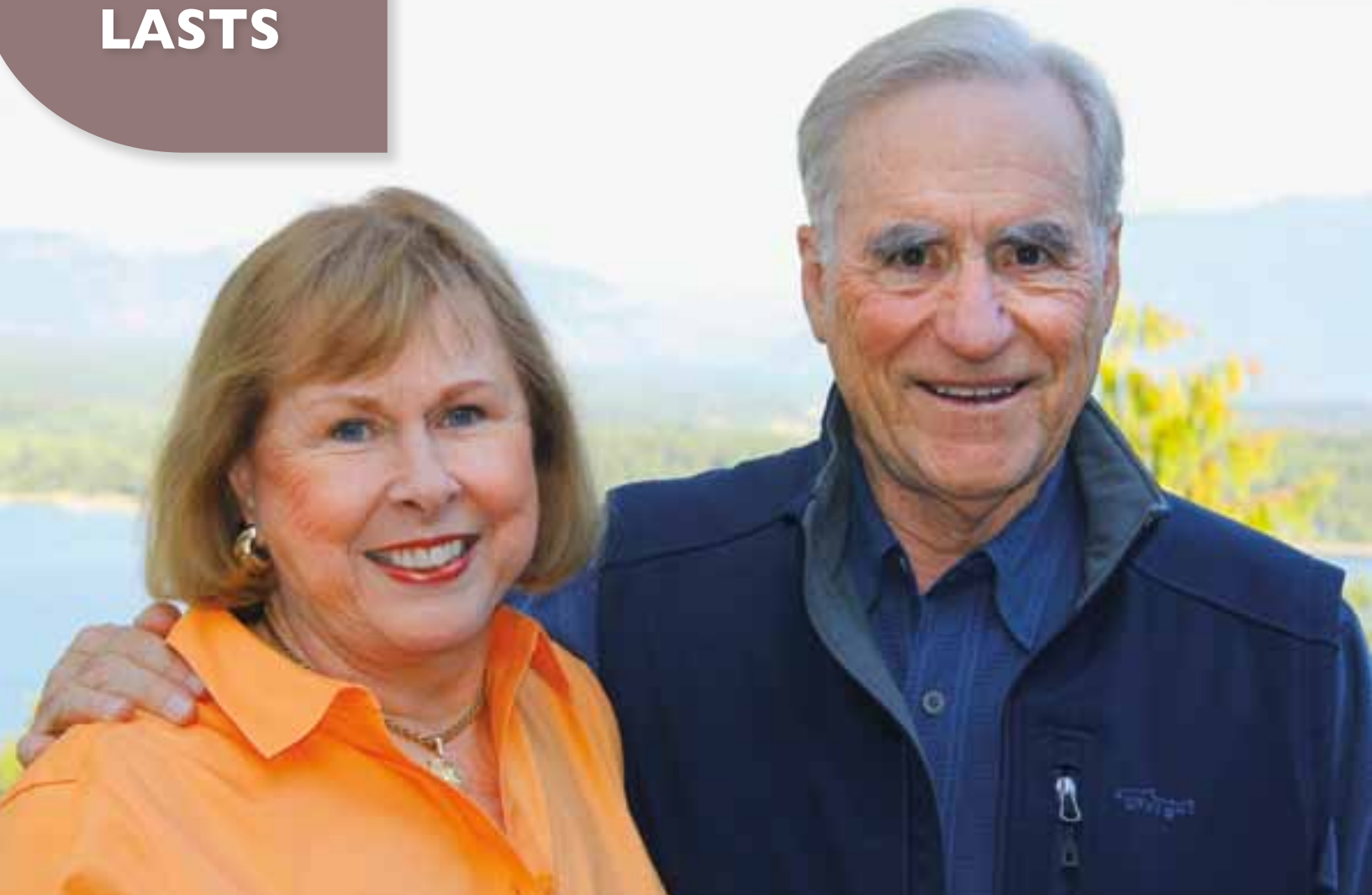
## WHITEFISH LAKE GOLF CLUB

The **PATRON GOLF PASS PROGRAM** offers a limited number of transferable golf passes or two individual season passes. Since its inception in 2007, over \$112,000 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!



**WHERE  
GIVING  
LASTS**



## Dorothy and Luther Campbell

*"Dorothy and I became strong supporters of the Whitefish Community Foundation because it is an organization dedicated to positively impacting the needs of our community. Now as we get towards the end of life, we want to support the community for a longer period of time. The WCF LEGACY SOCIETY creates that opportunity. By making a significant bequest through the Legacy, we have created a fund that can continue supporting our interests into the future as organizations change and grow. Our career successes were part luck, hard work, and good educations. An important part of our Legacy bequest is to educate members of our community through scholarships." -Luther Campbell*



**WHITEFISH COMMUNITY FOUNDATION**  
We're here to help you leave a **lasting legacy** according to your wishes.

## ENRICHING OUR FUTURE

### 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 (5)                | John Kramer Jr.                   |
| Carol and Richard Atkinson   | Janice and Paul McCann            |
| Cameron Blake and Sandy Gray | Dean A. Robbins (Wiley Homestead) |
| Luther and Dorothy Campbell  | Doris Schumm*                     |
| Anne and John Collins        | Janna and Jamie Shennan           |
| Martha and Jeffrey Hamilton  | Dave Stewart                      |
| Connie and Jake* Heckathorn  | Mary Jane and Russ Street*        |
| Joaquenia and Klaus Heinrich | Virginia V. Weldon                |
| Kristin and Gregory Hetzer   | Susan and John Witt               |
| Fay and Peter Jones          | *Deceased                         |
| Herbert Kameon Trust         |                                   |



(Top to bottom):  
Doris Schumm,  
Russ and Mary Jane Street

### 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

# 8 1 0 2 0 1 8

Among 269 community foundations surveyed for the most recent Foundation Center's CF Insights Survey, the Whitefish Community Foundation ranked:

## #1

in gifts per capita

## #9

in distribution of assets having distributed 20% to nonprofits

## BY THE NUMBERS

### COMPOSITION OF ASSETS

#### 2018 YEAR END (IN THOUSANDS)

**TOTAL ASSETS \$31.16M:**

ASSETS	TOTAL
Donor Advised Funds	\$18,030
Agency Endowment Funds	\$6,175
WCF Endowment Fund	\$3,210
Agency Funds	\$1,444
Designated Funds	\$772
Gift Annuity Funds	\$729
WCF Community Grant Funds	\$546
General Operating Funds	\$254

**TOTAL ASSETS YEAR END ..... \$31,160**

#### OPERATING REVENUE

Fundraising Programs	\$187,668
Endowment Distribution	\$140,000
Fund Admin Fees	\$190,705
Contributions	\$67,826

**TOTAL OPERATING REVENUE ..... \$586,199**

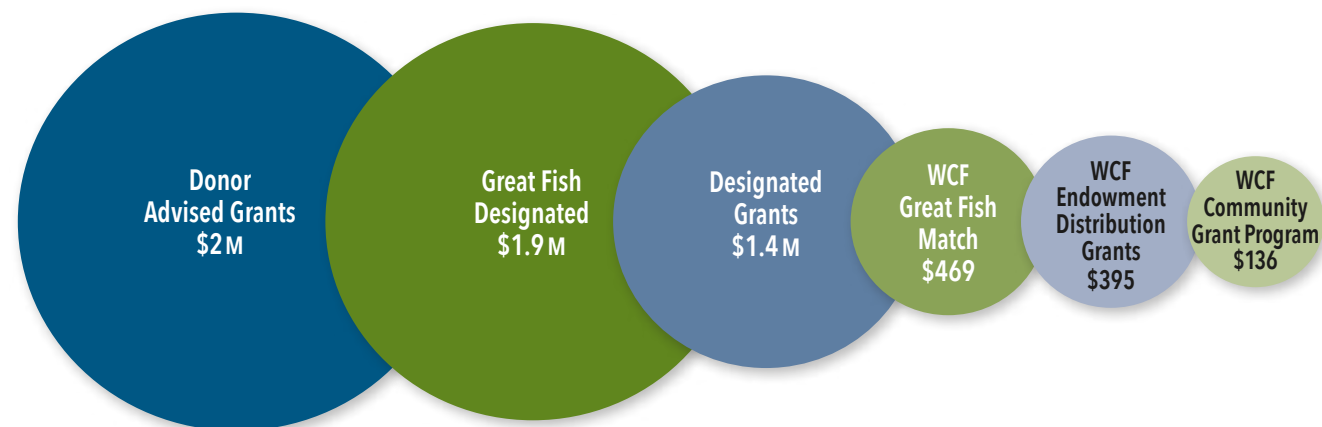
**TOTAL OPERATING EXPENSES..... \$497,526**

### 10-YEAR GROWTH OF ASSETS



### COMMUNITY INVESTING GRANT PROGRAMS (IN THOUSANDS)

**TOTAL ASSETS \$6.2M:**



#### INVESTMENT COMMITTEE

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

Jeff Allen  
Technology Industry

David Dittman  
President | First Interstate Bank

Greg Garrison  
Retired, Vice Chairman | PwC

Jay Latimer  
Retired | Entrepreneur

Jamie Shennan  
Venture Capital | Trinity Ventures

Dave Stewart  
Retired | International Banking

Ken Wessels  
Retired, CEO | Wessels, Arnold & Henderson

John Witt  
Retired | Bill Matrix Corporation

#### FINANCIAL MANAGERS DISCLOSURE

Investment Manager:  
Mason Investment Advisory Services

Custodian: TD Ameritrade

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

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

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

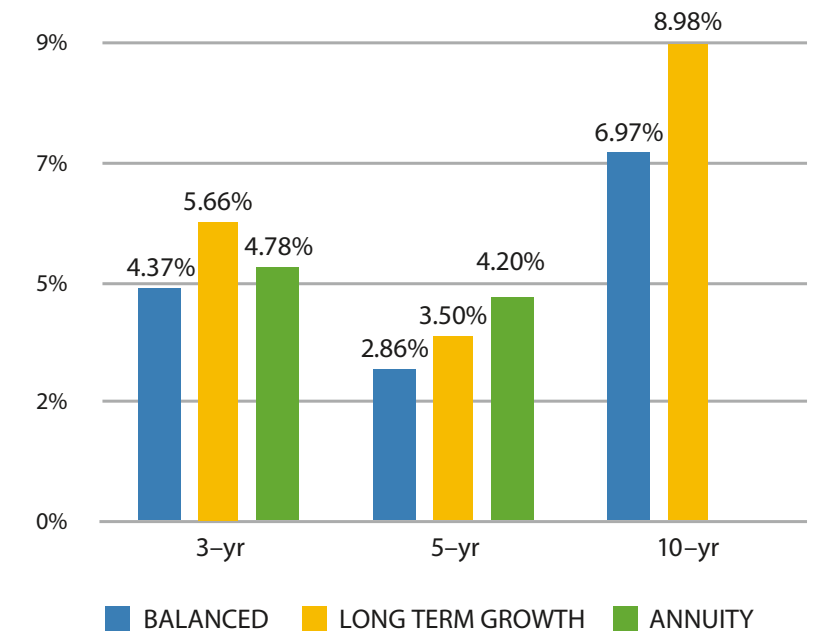
The Whitefish Community Foundation recommends that you seek advice from your tax advisor and/or attorney for all your charitable giving.

## FINANCIAL STEWARDSHIP

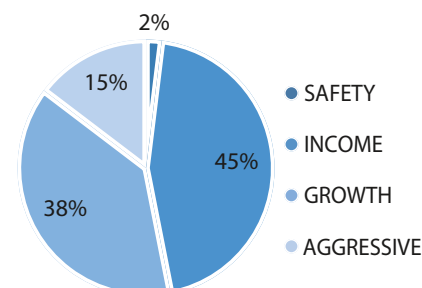
The purpose of the Whitefish Community Foundation's investment program is to provide charitable funds to various community endeavors consistent with our mission, with a primary objective of preserving the value of donor gifts while earning a total return sufficient to support both growth and grant making. This is achieved through investment in a diverse portfolio designed to maximize returns while minimizing risk and volatility.

Our portfolio is managed by Mason Investment Advisory Services and overseen by our Investment Committee, which is comprised of community members with a broad range of investment experience.

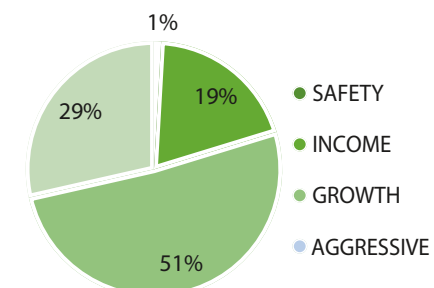
### INVESTMENT RETURNS (ANNUALIZED)



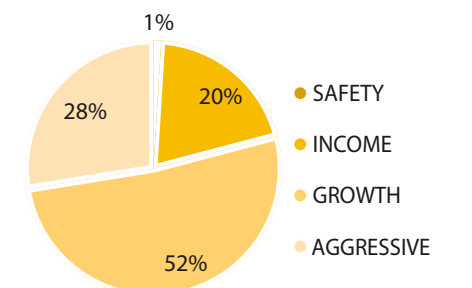
#### BALANCED POOL ALLOCATION



#### ANNUITY POOL ALLOCATION



#### LONG TERM GROWTH ALLOCATION



WHERE  
GIVING  
THRIVES

## WHERE GIVING THRIVES, COMMUNITIES THRIVE TOO.



### IN MEMORY OF:

Marilyn Brown  
Jake Heckathorn  
Jean Howard  
Eric Hosek  
Wallace Opdycke  
James Reep  
Doris Schumm  
Carolyn D. Smith

Whitefish Pilot—Heidi Desch



## IN MEMORIAM

### ERIC HOSEK (1953-2018)

Ever the optimist, Eric always said, “the sun will come up in the morning.” He had deep family roots in Whitefish raising his two sons here with his wife of 33 years, Dusty.

Eric was a community activist and an avid supporter of improving the lives of our children through education. He was twice elected to serve on the Whitefish School Board and also served as a Board member and volunteer for the Whitefish School District Education Foundation. His creative ideas led to campaigns like the “High Five for Education” and “The Spelling Bee” fundraiser.

He was very devoted to developing the Education Foundation, so devoted that he wasn’t beyond dressing up as a bee to promote the cause for the Great Fish Community Challenge Color Run. His efforts were constant and diligent in raising funds for classroom projects and program needs in the Whitefish School District.

Beyond his passion for education, Eric was a member of the Flathead Nordic Ski Patrol and also served on the Whitefish Rink advisory board. He was supportive of many good organizations including Glacier National Park Conservancy and the Cabinet Peaks Medical Center Foundation, and he was active with the Whitefish Hockey Association. He was always willing to lend a hand, offer sound practical advice, or just listen to you without expectations or seeking acknowledgement.

His career as a senior financial advisor with D.A. Davidson for over 18 years led to more community minded work helping local nonprofits build and invest in permanent Endowment Funds. He worked with several nonprofits over his career, including the Whitefish Community Foundation, to build solid investing strategy and become good stewards of money. His passion for doing good and bringing about social change led him to presenting a TedX on Socially Responsible Investing in 2015.

Eric will be remembered for many things and we will miss his generous spirit and unrivaled commitment to his community.

### IRA JAMES (JAKE) HECKATHORN (1923-2018)

A retired Lieutenant Colonel in the United States Army, Jake Heckathorn was an active and very generous member of the Whitefish community. Jake was involved in Whitefish Rotary Club, Masons, Lions Club, and he was the second Prime Minister of the Whitefish Winter Carnival. He acted in administrative support and fundraising roles for North Valley Hospital which included co-chairing the 2001 Capital Campaign and he was Honorary Chairman for the new hospital campaign. He was a founding member of the North Valley Hospital Foundation and was awarded the “Spirit of Caring Award” in 2003. Jake was an avid supporter of volunteerism and started a monthly column in the Whitefish Pilot called “Cheers for Volunteers” to highlight local citizens who were making serious contributions as volunteers.

He and his wife of 67 years, Connie, shared a great passion to improve the quality of life in Whitefish. Connie is a founding Board member of the Whitefish Community Foundation and served as the Foundation’s first Grants Committee Chair. Jake supported Connie’s vision for the Whitefish Library and the fundraising efforts to build the facility we know and enjoy today.

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

# THANK YOU 2018 DONORS!

**THANK YOU 2018 DONORS** who give directly to support Whitefish Community Foundation programs. Every gift counts. Thank you for helping us make a difference in our community.

Abell, Charles and Susan  
Abruzzo Italian Kitchen  
Adams, Charles and Kathy  
Adams, Gregory and Kristina  
**Adams, William and Olga\***  
AGL Foundation\*  
Akey, Lin and Kathy  
Akey, Rob and Kim  
Allen, Jeff and Teri\*  
Amazon Smile  
Annau, Nathalie  
Arneson, Susan  
Ashton, Harry and Mary Dojnik  
**Atkinson, Richard and Carol\***  
Baird Foundation  
Baldrige, Summerfield and Julie  
Baltzell, Dean and Sharon  
Barasch, Steven and Charlene\*  
Barberis, Joseph and Pamela  
Barker, Rod and Marianne  
Battin, Sharlot  
Bay, Mogens and Cindy\*  
**Bayne, William and Elizabeth\***  
Beale, Paul and Amy Thompson Beale\*  
Beightol, James and Dolores  
Bell, Terry and Linda  
Bennett, Bob and Caryl\*  
Biele, Alexander and Kathleen Friday  
Big Sky Compounding Pharmacy  
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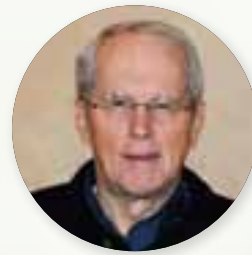
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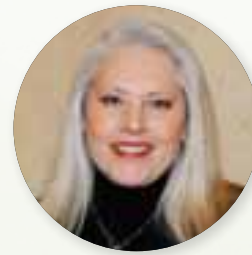
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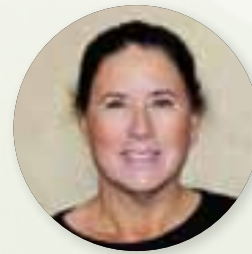
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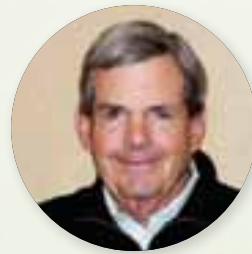
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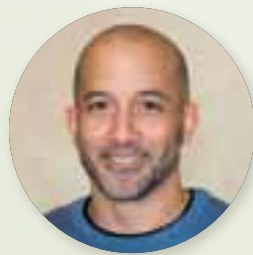
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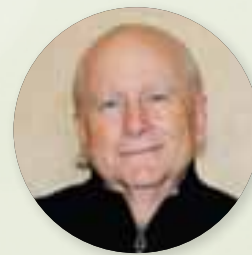
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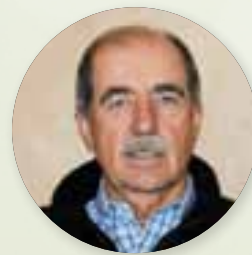
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*(Back row): Linda Hobbs and  
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P.O. Box 1060  
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