



WHITEFISH  
COMMUNITY FOUNDATION

Giving Together for the Flathead Valley

# CHANGING LIVES TOGETHER

2021 ANNUAL REPORT TO THE COMMUNITY





## OUR MISSION:

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

## OUR CHARTER:

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

Our end goal is to improve the quality of life in the Flathead Valley, which includes supporting nonprofits that provide valuable resources to our communities.

# 2021

## ANNUAL REPORT



## TABLE OF CONTENTS

From the Board Chair.....	3
Donor Features .....	4-11
Circle of Giving .....	12-13
Great Fish Community Challenge Campaign Report.....	14-15
Great Fish Community Challenge Special Awards .....	16-17
Kids Fund .....	18
Grant Programs.....	19-21
Nonprofit Development & Scholarships .....	22
Day of Giving & Unity.....	23
Legacy Society .....	24-25
Donor Advised Funds .....	26
Types of Funds .....	27
Building Endowments.....	28-29
Corporate Philanthropy .....	30-31
In Memoriam .....	32-33
Investment & Financial Stewardship.....	34-35
Donor Recognition .....	36-39
Leadership.....	40-41



COMMUNITY IMPACT

**\$58M**

CUMULATIVE GRANTS TO LOCAL NONPROFITS SINCE INCEPTION IN 2000

**\$29M**

TOTAL DONOR ADVISED GRANTS TO NONPROFITS SINCE 2000  
*(more on page 26)*

**\$17M**

GRANTED THROUGH THE GREAT FISH COMMUNITY CHALLENGE SINCE INCEPTION IN 2015  
*(more on page 14)*

**\$2.24M**

COMMUNITY GRANTS AWARDED SINCE INCEPTION IN 2000  
*(more on page 19)*

**\$669,000**

MAJOR COMMUNITY PROJECT GRANTS AWARDED SINCE 2010  
*(more on page 20)*

**\$1M**

GRANTED IN THE DAY OF GIVING & UNITY, A GIVING TUESDAY EVENT SINCE INCEPTION IN 2020  
*(more on page 23)*

FROM THE BOARD CHAIR

We began 2021 hopeful that it would be a year of “returning to normalcy.” Alas, it was not to be, and this virus continued to affect us throughout the year. Our community members and non-profit organizations were under tremendous strain.

We called on our donors for help, and they generously and graciously responded. Our Circle of Giving grew to more than 130 members. These core donors are passionate about making a difference in people’s lives. Since 2015, Circle of Giving donors have contributed more than \$5 million through the Foundation’s robust grant programs. As a result of the generosity of our donors, Whitefish Community Foundation was able to support several critical projects and programs in 2021.

While I’m expressing gratitude for the generosity of our Circle of Giving, I would like to acknowledge two members who went above and beyond for our community. Since its early days, Whitefish Community Foundation has operated out of a charming house owned by Mike and Barb Jenson. Last year Mike and Barb made a tremendous gift to the Foundation when they donated the house to the organization. Thanks to the Jensons, the Foundation now has a permanent home in the heart of Whitefish.

Looking forward, we are aware that the pandemic has profoundly affected the Flathead Valley. It has shifted where and how people live and work. We have seen unprecedented growth, which along with other factors, has led to an increase in housing costs and created a crisis for many people who are finding it very challenging to obtain affordable housing. We are working closely with donors and concerned citizens to help address this critical issue. We believe every community member deserves a chance to build a quality life in this place we all love.

I would like to thank Linda Maetzold for providing a steady hand for the past three years as Board Chair. As always, Linda Engh-Grady provides inspiration, enthusiasm, and leadership as she challenges the Board and staff to achieve more than we thought possible.

We welcome and appreciate your feedback and continued involvement in our mission and work. Thank you for believing in what we do and helping us keep our communities strong and vibrant. **We are changing lives together!**

*Ardy Whisler*

Ardy Whisler  
Board Chair  
2022



*"As long as people believe in the organization, see the potential for good, and support it, Whitefish Community Foundation will continue to be successful."*

-Mike and Barb Jenson



## Mike and Barb Jenson

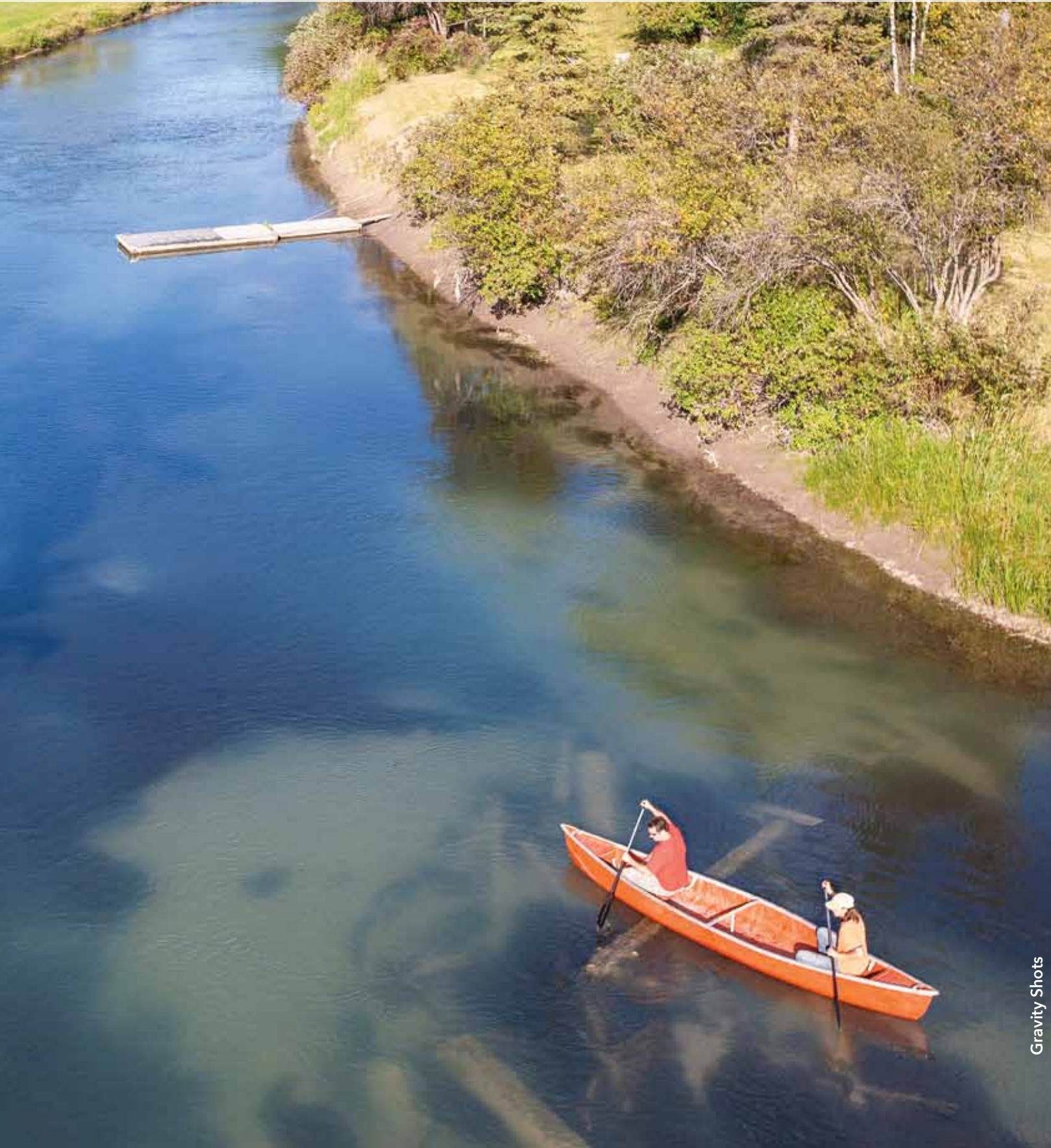
*"I have been personally involved with Whitefish Community Foundation since its inception, and I still believe it is part of the solution to problems Whitefish and the Flathead Valley will face in the coming years. As long as people believe in the organization, see the potential for good, and support it, Whitefish Community Foundation will continue to be successful."*

*Whitefish Community Foundation has been a co-occupant of our building on Second Street West since shortly after I closed my gallery there in 2004. When Barb and I began to consider the future of the building, we agreed that making it the Foundation's permanent home just felt right. Not only does this gift go a long way toward ensuring the existence of the Foundation, it also takes care of where it will be physically located in the future. We like the thought of Whitefish Community Foundation being here rather than it being simply sold for another business. This is not only a gift to the Foundation, it's also a gift to Whitefish. We very much enjoy living here!"*

Mike Jenson co-founded Whitefish Community Foundation in 2000 along with Connie Heckathorn, John Kramer, Roxanne Rogers, and Dave Stewart. The Foundation would not be the place it is today without Mike's vision, creativity, and kindness. He and his wife Barb generously transferred ownership of 214 West Second Street to Whitefish Community Foundation in September of 2021. The Foundation is humbled by this gift and beyond grateful to the Jensons for providing us with a forever home.

*"...the simple concept of 'give where you live' resonated deeply with us."*

*-Maetzold Family*



Gravity Shots



## Maetzold Family

*"Charlie and I met in Bigfork in 1979. Charlie had recently purchased the local town café, the Buffalo Café, and I was beginning a new career in Kalispell at Conrad National Bank. We married and in 1983 moved our young family and the Buffalo Café north to Whitefish, with the goal of skiing more and working less. Well, the "working less" part in the restaurant business took another 37 years to accomplish, but along the way our family business remained in Whitefish and now includes our two sons, their wives, and grandkids. We have also been fortunate to have made many long and fulfilling relationships that continue to connect us deeply to our beloved Whitefish and Flathead Valley.*

*We were first introduced to Whitefish Community Foundation over 20 years ago when the founders were brainstorming over morning coffee at the café. As we watched the Foundation grow, we were impressed by the positive impact this energized organization was having in our community by bringing together committed donors and nonprofits to benefit our Valley and lift our neighbors in need. It was an easy decision to become involved with the Whitefish Community Foundation and the Circle of Giving as a tangible way to give back to a community that had supported our family business for so many years.*

*We have seen our Valley grow tremendously over the years, and the simple concept of "give where you live" resonated deeply with us. We love our town and trust the Whitefish Community Foundation to use our donations to make the greatest impact on the lives of everyone in the Flathead."*

*Linda Maetzold has been highly involved with Whitefish Community Foundation since the early days, serving on the Board of Directors and in various officer roles. She served as Board Chair from 2019-2021, leading the organization through a period of rapid growth and bringing us to a new level of excellence in governance. While serving as Board Chair, Linda participated in every committee to ensure she had a thorough understanding of the scope of the Foundation's work. She continues to serve as the Chair of the Nominating and Governance Committee.*

(Photo-left): Whitefish River

*"We are grateful to all who have worked so hard to make the Foundation a community treasure!"*

*-Tom and Teresa Quinn*



## Tom and Teresa Quinn

*"Many years ago we came to Whitefish to visit our youngest daughter, Caeli. We fell in love with this little town, bought a home, and set out to learn about the local area. We had the great fortune to meet Richard and Carol Atkinson and John Kramer and quickly learned from them about the needs of the community. They steered us directly to the Whitefish Community Foundation. Soon afterward, we transferred our charitable giving from our Family Foundation in Orlando to our Donor Advised Fund with Whitefish Community Foundation. We have greatly enjoyed the opportunities to help fund selfless nonprofits and their programs.*

*We can think of no other organization in this part of Montana that is such a source of inspiration as Whitefish Community Foundation. It is an honor and a pleasure to be part of such a dynamic and grounded institution. The early founders were wise and dreamed big.*

*It is the most FUN thing we do. It is also the most satisfying. To watch the Foundation and the benefiting nonprofit organizations grow and prosper, to see the services they provide for their constituents, and to be witness to the relief they provide for so many people is truly awe-inspiring."*

Tom and Teresa Quinn became active with Whitefish Community Foundation shortly after they moved to the Flathead Valley. Over the past 14 years, Whitefish Community Foundation has worked with the Quinns to further their charitable giving. Tom served for seven years on the Board of Directors and for 12 years on the Grants Committee. Tom and Teresa's daughter, Caeli Quinn, is following in her parents' philanthropic footsteps and recently joined the Board of Directors.

*"We encourage everyone to show their determination to assist those in need, and we believe there is no better way than the Whitefish Community Foundation."*

-Andrew and Linda Viens



Chuck Haney



Dianne Doy

## Andrew and Linda Viens

*"When we relocated from Houston to Kalispell in 2014, we made quite a few friends and were enjoying life under the Big Sky but were struggling to find the right charities to support. It was pretty easy when we lived in Houston but not so easy here as we vetted a number of organizations and weren't satisfied with what we learned. We love to ski and a few seasons ago we got really cold in the parking lot putting on boots and schlepping skis across the lot to the lift. A friend suggested we join Whitefish Community Foundation's Patron Ski Pass Program. We called and talked with Linda Engh-Grady and learned how the program benefits local charities.*

*Next ski season came, and we got our locker and passes. Our locker happened to be next to Betsy Bayne's. Betsy was a longtime member of the Foundation's Board of Directors, and we enjoyed visiting with her. Betsy would tell us about special grants the Foundation had awarded to various organizations, as well as what their broader programs were accomplishing. It was clear to us that the Foundation knew the community and was very focused in its mission. We spoke with Linda a bit more, and it became an easy decision for us to become members of the Circle of Giving.*

*As the population of the Flathead Valley continues to grow, so do the needs of our local communities. We really believe that Whitefish Community Foundation is a great way to serve these needs. The Foundation continues to raise more funds to meet these needs every year. You can see what a great job they are doing by looking at the results of the 2021 Great Fish Community Challenge."*

Andrew and Linda Viens joined the Circle of Giving in 2018 and represent a growing number of Kalispell-area donors who have become active with Whitefish Community Foundation in recent years because they see the positive impact their gifts are making on the entire Flathead Valley.



through  
GENEROSITY



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

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

# CIRCLE OF GIVING

**THE CIRCLE OF GIVING** is Whitefish Community Foundation's core group of donors who see the value of philanthropy and what it can do to change lives. Circle donors support the mission of the Foundation with an annual gift of \$5,000 or more, with donors giving as much as \$50,000. The Circle allows donors to pool their resources to create maximum impact multiplied over hundreds of charitable projects and programs. The Circle is the backbone of the Great Fish Community Challenge, making it possible for the Foundation to organize and host the Challenge and provide a strong matching grant each year. Ninety-six percent of gifts made to the Circle of Giving directly support the Foundation's grant programs and the Great Fish Community Challenge. Four percent of Circle gifts support the Foundation's operations.

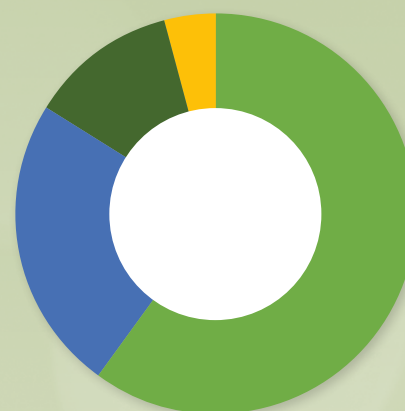
- |                                    |  |                                  |
|------------------------------------|--|----------------------------------|
| Anonymous (1)                      | Kate and Ross Dworman                  | <b>Allison and Rick Magnuson</b> |
| <b>AGL Foundation</b>              | First Interstate Bancsystem Foundation | Janet Mayo                       |
| <b>Teri and Jeff Allen</b>         | Michael Fraser                         | Rhona and Jerry Meislik          |
| Kate and Chip Andrews              | Fun Beverage                           | <b>Lori Miller</b>               |
| Brent Appलगren                     | <b>Barbara and Mike Gallagher</b>      | <b>Ellen and Matt Moran</b>      |
| Val and Beau Armstrong             | Laura and James Garbacz                | <b>Barbara Morris</b>            |
| <b>Carol and Richard Atkinson</b>  | Kathy and Greg Garrison                | Nichola Opdycke                  |
| Lisa and Bob Bailey                | <b>Marion and Duff Gerrish</b>         | Sandy and Dan Perl               |
| Julie and Summerfield Baldrige     | Tanya and Judah Gersh                  | Coco and Ross Pickert            |
| Ledjie and Phillip Ballard         | Adele Goldberg                         | Blanche Puffer                   |
| <b>Sharon and Dean Baltzell</b>    | <b>Cheryl Watkins and Dick Gordon</b>  | <b>Quinn Family</b>              |
| Charlene and Stephen Barasch       | Linda Engh-Grady and Dave Grady        | <b>Nikki and Doug Reed</b>       |
| Trish and Rick Bartoskewitz        | Cindy Granmo                           | Melinda and Rick Reed            |
| <b>Cindy and Mogens Bay</b>        | <b>Colleen and Peter Grant</b>         | Sue and Hank Ricklefs            |
| <b>Betsy and Bill Bayne</b>        | <b>Sarah and John Graves</b>           | <b>Karen and Ron Rosenberg</b>   |
| <b>Dee and Jim Beightol</b>        | Cameron Blake and Sandy Gray           | Kim and George Ruhana            |
| Tierney and Jon Beizer             | <b>Cindy and Joe Gregory</b>           | Char Rygg                        |
| Linda and Terry Bell               | <b>Shirley and John Griffith</b>       | <b>Stacy Schlinger</b>           |
| Bonnie and Rick Billuni            | Jill and Christopher Gwaltney          | <b>Mark Schmidt</b>              |
| <b>MaryAnn and Bill Bindley</b>    | <b>Jes and John Hagale</b>             | Marie and Mike Shaw              |
| <b>Sandy and Dick Boyce</b>        | <b>Mary Lloyd and Dick Harding</b>     | <b>Janna and Jamie Shennan</b>   |
| Tara and Matt Brister              | Stephanie and Fred Harman              | Ashley and G. Stacy Smith        |
| Beth and Jerome Broussard          | Margo and Gary Harrod                  | Linda Smith                      |
| <b>Rockwood Brown</b>              | <b>Shannon and Brian Haycox</b>        | Lucy Smith                       |
| <b>in Memory of Marilyn</b>        | <b>Patty and Bob Hayes</b>             | <b>Carole and Roger Spragg</b>   |
| Lindsey and Todd Burris            | Kelly and Robert Hayes                 | Margy and Rob Stevens            |
| <b>Eileen Bocci Campbell</b>       | Jill and Grant Henderson               | Nancy and David Stokes           |
| <b>Dorothy and Luther Campbell</b> | Suzanne and Richard Hildner            | <b>Jill and Jim Stroud</b>       |
| Missy and Pat Carloss              | Cheryl and Brad Howard                 | Meg and Chris Temple             |
| <b>Janice and James Case</b>       | <b>Bill Howard</b>                     | Kristen and John VanDenburgh     |
| <b>Maureen Casey</b>               | <b>Ila B. Dousman Fund</b>             | Linda and Andy Viens             |
| Jane Kollmeyer and Terry Chute     | <b>Iron Horse Foundation</b>           | <b>Lori and Robb Voyles</b>      |
| Marie and Brian Clark              | <b>Barbara and Mike Jenson</b>         | <b>Dori and Bill Walton</b>      |
| Dyan and Michael Colby             | <b>Ann and Paul Jeremiassen</b>        | Katie and Ben Ward               |
| Jim and CK Coles                   | Ann and Bill Jones                     | Leslie and Mike Warning          |
| <b>Anne and John Collins</b>       | Robyn and Mark Jones                   | <b>Boots and Alan Warrick</b>    |
| Linda Cornutt                      | Brenda and Jonny Jones                 | Carol Bibler and Jim Watson      |
| Stacy and Michael Covey            | Rachel Kelton                          | <b>Byrdie and Ken Wessels</b>    |
| <b>Katherine and Gordon Cross</b>  | Maureen and John King                  | <b>Ardy and Steve Whisler</b>    |
| Beverly and Larry Dale             | <b>Jon McBride and John Kramer</b>     | <b>Judy and David Williams</b>   |
| Scott Darkenwald                   | Julie Williams and Marshal Kushniruk   | <b>Mary and Hal Williamson</b>   |
| Candy and Eddie DeBartolo          | <b>Mignon and Jay Latimer</b>          | Bet and Doug Wise                |
| Jane and Gary Decker               | Gerry and Frank Leftwich               | <b>Susan and John Witt</b>       |
| Lynnette and Mark Donaldson        | <b>Sherry and Dave Lesar</b>           | Debra Wolf                       |
| <b>Debbie and Robert Douglas</b>   | Kristen Sramek and Josh Lozman         |                                  |
| Nora and Blake Dunlop              | <b>Linda and Charlie Maetzold</b>      |                                  |



Brian Schott

## CIRCLE OF GIVING

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



We encourage you to join this extraordinary group of donors inspring our communities to give through the Great Fish Community Challenge and making good things happen in the Flathead Valley.

**\$1,409,000**  
DONATED TO THE CIRCLE OF GIVING PROGRAM IN 2021

**130**  
DONORS IN 2021

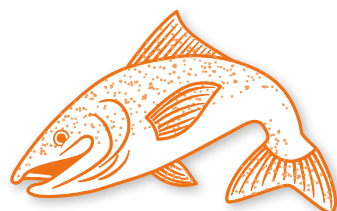
**\$10,842**  
AVERAGE GIFT SIZE IN 2021

**2021 ALLOCATION:**

- 60% Great Fish Community Challenge
- 24% Community Grants, Discretionary Grants, Major and Micro Grants
- 12% Community Emergency Response Fund
- 4% Whitefish Community Foundation's Operations



INSPIRATION



WCF provided a percentage match on the first \$20,000 raised by each nonprofit for a maximum matching grant of \$11,200 per organization.

## WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

**THE GREAT FISH COMMUNITY CHALLENGE** is truly a community-driven effort, inspiring greater giving and participation from across the Flathead while building awareness about the critical work of our local nonprofits. The Challenge brings us together through a single, high-profile, and collectively beneficial event. Since 2015, the Great Fish Community Challenge has raised over \$17 million for more than 75 Flathead Valley nonprofit organizations. Whitefish Community Foundation organizes the Challenge free of charge for qualifying nonprofits.

**\$17M**

RAISED SINCE INCEPTION IN 2015

**\$4,200,643**

RAISED IN THE 2021 CHALLENGE FOR 61 CHARITIES

**56%**

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

**\$665,739**

TOTAL MATCH AWARDED

MAXIMUM MATCHING GRANT OF \$11,200

**28%**

INCREASE IN FUNDS RAISED THROUGH THE 2021 CHALLENGE OVER 2020

**\$285,000**

COST TO ORGANIZE THE 2021 GREAT FISH COMMUNITY CHALLENGE



Heidi Desch



**TOTAL RAISED**

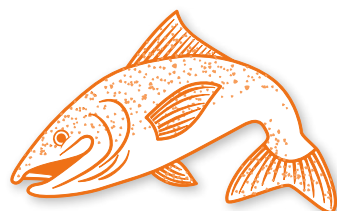
BY THE NONPROFITS PARTICIPATING IN THE 2021 GREAT FISH COMMUNITY CHALLENGE INCLUDING THE MATCH

**\$4,200,643**

- Abbie Shelter ..... \$155,540
- Backpack Assistance Program ..... \$85,893
- Big Brothers Big Sisters NW Montana ..... \$37,414
- Bob Marshall Wilderness Foundation..... \$57,594
- Boys and Girls Club of Glacier Country..... \$64,348
- Braveheart Chaplain Ministry..... \$33,941
- CASA for Kids..... \$178,883
- Center for Restorative Youth Justice ..... \$70,510
- Child Bridge..... \$131,442
- DREAM Adaptive Recreation ..... \$121,363
- Farm Hands–Nourish the Flathead ..... \$99,799
- Flathead Area Mountain Bikers..... \$40,957
- Flathead Audubon Society..... \$35,632
- Flathead County Sheriff’s Posse..... \$32,668
- Flathead Food Bank ..... \$89,160
- Flathead Land Trust..... \$67,196
- Flathead Rapids Youth Soccer ..... \$34,466
- Flathead Valley Community College Fdn..... \$86,357
- Flathead Warming Center ..... \$63,807
- Flathead Youth Home ..... \$64,167
- Foy’s to Blacktail Trails..... \$34,827
- Friends of the Flathead Avalanche Center..... \$35,990
- Gateway to Glacier Trail..... \$35,218
- Glacier National Park Conservancy ..... \$109,344
- Glacier Nordic Club ..... \$54,830
- Glacier Skate Academy..... \$26,582
- Glacier Symphony & Chorale..... \$63,585
- Hockaday Museum of Art..... \$34,505
- Humane Society of Northwest Montana..... \$102,421
- ImagineIF Library Foundation..... \$41,150
- Intermountain Children’s Services..... \$47,316
- Kalispell Education Foundation..... \$33,861
- Lighthouse Christian Home & Services ..... \$66,654
- Montana Children’s Medical Center Fdn ..... \$54,358
- Montana Conservation Corps..... \$50,679
- Montana Kayak Academy..... \$16,987
- Nate Chute Foundation ..... \$104,097
- North Valley Food Bank ..... \$130,788
- North Valley Hospital Foundation ..... \$91,556
- North Valley Music School..... \$126,717
- North West Montana Veterans Food Pantry ..... \$55,407
- Project Whitefish Kids ..... \$81,552
- Ravenwood Outdoor Learning Center ..... \$39,761
- Samaritan House ..... \$110,803
- Shepherd’s Hand Free Clinic..... \$66,453
- Sparrow’s Nest of NW MT..... \$126,746
- Stumptown Art Studio..... \$34,971
- Tamarack Grief Resource Center..... \$15,914
- The Nurturing Center..... \$31,802
- The Wave ..... \$16,300
- Whitefish Community Center..... \$38,167
- Whitefish Community Foundation ..... \$83,380
- Whitefish Dog Park..... \$65,789
- Whitefish Firefighters Association ..... \$32,919
- Whitefish Lake Institute..... \$71,766
- Whitefish Legacy Partners ..... \$226,087
- Whitefish Review ..... \$39,184
- Whitefish School District Education Fdn ..... \$49,656
- Whitefish Theatre Co..... \$86,404
- Whitefish Veterans Support Team ..... \$62,139
- Wings Regional Cancer Support ..... \$31,575



through  
EXCELLENCE



**GREAT FISH AWARD**  
**\$7,500**

## GREAT FISH SPECIAL AWARDS

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



### ABBIE SHELTER

As the most prestigious award presented by Whitefish Community Foundation every year, the Great Fish Award recognizes a nonprofit that has made a significant contribution to the betterment of the Flathead Valley while also proving to be an enthusiastic Great Fish Community Challenge participant. In 2021, Abbie Shelter received the Great Fish Award in recognition of the critical services they provide to local victims of domestic and sexual violence. Over the past six years, they have leveraged the Challenge to expand grassroots support, growing from 50 donors and \$46,000 raised in 2015 to 361 donors and \$144,470 raised in 2021.

### JEAN HOWARD MEMORIAL AWARD

**\$5,000**

#### FLATHEAD WARMING CENTER

Jean Howard was a wonderful friend of Whitefish and the Community Foundation. To honor Jean's memory and her philanthropic heart, Jean's family established the Jean Howard Memorial Award in 2016. In 2021, the Howard family selected the Flathead Warming Center to receive the Jean Howard Memorial Award. The Warming Center is open every night from late fall until April, offering low-barrier shelter to those in need during the coldest nights. Through the 2020/21 season, the center served 207 unique individuals for a total of 3,120 shelter stays. The center completed renovations in their new, permanent home in late 2021, doubling their capacity and opening shower and laundry services for anyone in need.



### RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD

**\$2,500**

#### DREAM ADAPTIVE RECREATION

Russ and Mary Jane Street were on the original Board of Directors of Big Mountain Resort and were part of the dirty dozen who founded Whitefish Winter Carnival. In 2002, Mary Jane Street set up a charitable remainder trust and selected Whitefish Community Foundation as the beneficiary. The Russ and Mary Jane Street Community Service Award is given annually to an organization honoring the Streets' service to our community. In 2021, DREAM Adaptive Recreation received the Russ and Mary Jane Street Community Service Award for their work to break barriers and ensure individuals with disabilities have the opportunity to enjoy outdoor recreation in the Flathead Valley.



### DORIS SCHUMM COMMUNITY SPIRIT AWARD

**\$2,500**

#### NORTH VALLEY FOOD BANK

In November 2009, Whitefish lost a beloved community member and friend, Doris (Dorie) Schumm. In 2010, Whitefish Community Foundation received a bequest from Dorie, who had the foresight to set up a charitable remainder trust in 1999 before the Foundation even existed. In 2021, North Valley Food Bank received the Doris Schumm Community Spirit Award for their work to alleviate hunger and address food insecurity in Whitefish and nearby communities. As a dedicated volunteer at North Valley Food Bank for many years, Dorie would have been thrilled that she continues to have an impact on an organization that mattered so much to her.

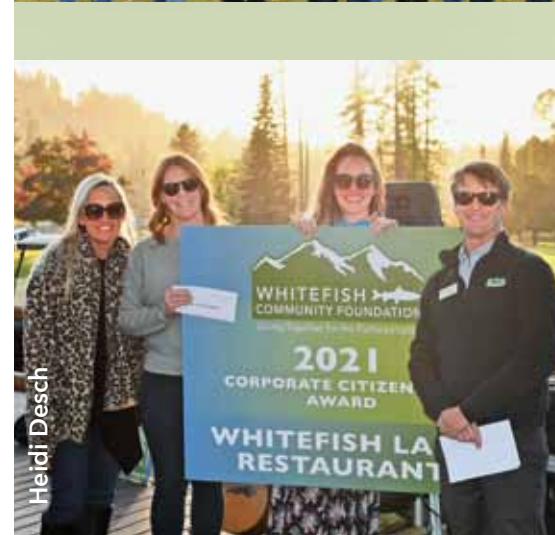


### CONNIE HECKATHORN CHEERS FOR VOLUNTEERS AWARD

**\$2,500**

#### BACKPACK ASSISTANCE PROGRAM, IN MEMORY OF TRACI STOLTE

Connie Heckathorn passed away in 2020, leaving a rich legacy of community projects and volunteer service. In honor of Connie's commitment to volunteerism, Whitefish Community Foundation recognizes another outstanding volunteer, Traci Stolte, whom we lost in October 2020. Traci worked tirelessly to elevate the Backpack Assistance Program. Under her stewardship, food became healthier and the program grew to serve over 175 kids each week in the Whitefish School District and at Olney-Bissell School.



### CORPORATE CITIZENSHIP AWARD

#### WHITEFISH LAKE RESTAURANT TO CHARITY OF ITS CHOICE

**\$2,500**

#### NATE CHUTE FOUNDATION

The Corporate Citizenship Award is given each year to a local business that goes above and beyond to support the Great Fish Community Challenge and participating nonprofits. Doug Reed and his team at Whitefish Lake Restaurant have been looking out for our local nonprofit community for decades. The restaurant has hosted hundreds of nonprofit events, provided catering for auctions and fundraisers, often dedicating their own staff to assist. Every nonprofit participating in the Great Fish Community Challenge has benefitted from Doug's support of the Circle of Giving and the countless ways Whitefish Lake Restaurant helps run successful events throughout the year.



through  
OPPORTUNITY



**\$130,000**  
KIDS FUND GRANTS  
AWARDED IN 2021

**\$180,000**  
KIDS FUND GRANTS  
AWARDED SINCE  
INCEPTION IN 2019



## KIDS FUND GIVING VOICE TO CHILDREN

Whitefish Community Foundation's Kids Fund was established in 2019 as an initiative to help address child homelessness in the Flathead Valley. The goal of the Kids Fund is to support small and large-scale programs in the areas of health, safety, and education that mitigate challenges and prevent local youth from becoming homeless. To date, Whitefish Community Foundation has awarded \$180,000 in Kids Fund grants to local nonprofit organizations, including these five grants awarded in 2021:

### **\$50,000 AWARDED TO BOYS & GIRLS CLUB OF GLACIER COUNTRY**

To provide after-school programming to more than 75 K-8 students from Helena Flats School, East Evergreen Elementary, Evergreen Junior High, and the Flathead Crossroads Program. Trained Boys & Girls Club staff members lead students through various educational projects designed to instill healthy habits, build life skills, and cultivate leadership traits.

### **\$50,000 AWARDED TO CASA FOR KIDS**

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

### **KIDS FUND FAST TRACK GRANTS**

#### **\$10,000 AWARDED TO CHILD BRIDGE**

To support the creation of an in-house studio to produce videos, podcasts, and educational materials to recruit and equip foster families in the Flathead Valley.

#### **\$10,000 AWARDED TO FARM HANDS-NOURISH THE FLATHEAD**

To support the "Hands in the Dirt" summer camp and Farm to School programming at Wildcat School Garden in Columbia Falls, providing local children with education, life skills, and access to fresh and healthy food.

#### **\$10,000 AWARDED TO FLATHEAD YOUTH HOME**

For the purchase of a safe, reliable vehicle to transport youth to school, appointments, family visits, and community activities.

(Photo): Flathead Youth Home



**30**  
NUMBER OF NONPROFITS  
RECEIVING A COMMUNITY  
GRANT IN 2021

**\$98,174**  
COMMUNITY  
GRANTS AWARDED  
IN 2021

**\$2.24 M**  
COMMUNITY GRANTS  
AWARDED SINCE 2000



## COMMUNITY GRANT PROGRAM

The **COMMUNITY GRANT PROGRAM** helps nonprofits of all sizes with projects and programs benefiting the Flathead Valley and Eureka. The Community Grant program often provides a gateway for small nonprofits to become involved with Whitefish Community Foundation. Through 2021, nonprofits could apply for up to \$4,000 annually.

### COMMUNITY GRANT AWARDS

- Big Mountain Commercial Association - Mountain Climber bus service | \$3,000
- CF-WF High School Swim Teams - Youth swimming | \$4,000
- Children's House Montessori School - Need-based scholarships | \$3,000
- City of Whitefish - Fireproof gear for volunteer firefighters | \$4,000
- City of Whitefish - Summer day camp scholarships | \$4,000
- Climate Smart Glacier Country - Zero-waste education and projects | \$3,000
- Code Girls United - Online coding program | \$4,000
- Columbia Falls School District - Columbia Falls Bookmobile | \$4,000
- Creative Arts Council - Art program scholarships | \$2,500
- Flathead Community Health Center - Patient assistance fund | \$3,000
- Flathead Rivers Alliance - Ambassador program | \$3,000
- Funding Families with Type 1 Diabetes - Youth summer camp | \$4,000
- Girls on the Run Flathead Valley - Running and life skills program | \$4,000
- Glacier Hockey Association - Youth hockey | \$4,000
- Glacier Institute - Youth outdoor education | \$4,000
- Glacier Queer Alliance - Community workshops | \$4,000
- Good Grief Group - Youth grief camp | \$4,000
- Immanuel Foundation - Hospice room | \$2,000
- Kalispell Contemporary Art Center - Ceramics education | \$1,470
- Montana Wild Wings Recovery Center - Raptor rehabilitation | \$3,000
- Northwest Montana Community Land Trust - Columbia Falls affordable housing | \$4,000
- Northwest Montana Back Country Horsemen - Youth stock-packing program | \$2,000
- Rails to Trails of Northwest Montana - Street art murals | \$4,000
- Riding on Insulin - Skiing and snowboarding camp for youth with Type 1 diabetes | \$2,000
- The Patrol Fund - Avalanche equipment training | \$4,000
- The Vital Ground Foundation - Protection of land near Glacier | \$2,500
- Whitefish Community School - Curriculum for preschool students | \$2,410
- Whitefish Freestyle - Youth skiing and snowboarding scholarships | \$3,000
- Whitefish Safe Grad Night - Inclusive celebration for graduating seniors | \$3,000
- Whitefish Shines - Snowflake lighting and storage | \$3,294

(Photo): Rails to Trails of Northwest Montana tunnel murals



through  
GRANTS

# MAJOR COMMUNITY PROJECT GRANTS

## \$669,000

AWARDED SINCE PROGRAM INCEPTION IN 2010

**24** Major Community Project Grants of \$10,000 or more have been awarded since 2010 to help local nonprofit organizations complete capital projects that will have a significant and positive effect on communities in the Flathead Valley.

### \$25,000 GRANT



To **NORTH VALLEY FOOD BANK** to support the organization's facility expansion project. North Valley Food Bank has experienced a 300 percent increase in demand for their services since 2019. To address the growing problem of food insecurity in the Flathead Valley, the organization launched a capital project to expand warehouse space and create an onsite commercial kitchen. The expanded facility includes larger walk-in refrigeration and freezer units that staff and volunteers can access with an automated handcart or fork lift. The project also included adding a commercial kitchen to the facility so staff and volunteers can process, preserve, and store nutritional foods throughout the year.

*"The support from Whitefish Community Foundation for our remodel will make a big difference in our community," said Sophie Albert, North Valley Food Bank Executive Director. "The remodel was necessary to address the significant increase in the need for food assistance in the Whitefish area."*



### \$15,000 GRANT

To **FLATHEAD LAND TRUST** to help complete the Bad Rock Canyon Conservation Project in Columbia Falls. The project will permanently protect 772 acres of critical habitat along the Flathead River that is utilized by 43 species that have been identified by Montana Fish, Wildlife and Parks as species of greatest conservation need. The project will also offer an opportunity to expand the Gateway to Glacier Trail system for use by hikers and bicyclists.

*"We are so excited and grateful to the Whitefish Community Foundation for this grant," Flathead Land Trust Executive Director Paul Travis said. "The new Bad Rock Canyon Wildlife Management Area will protect a critical piece of wildlife habitat along the Flathead River and secure public access to a wild place right on the doorstep of Columbia Falls. Thank you to Whitefish Community Foundation for this generous show of support to protect a special place in the Flathead."*





through  
EDUCATION



## FLATHEAD NONPROFIT DEVELOPMENT PARTNERSHIP

As part of our work to strengthen nonprofits to excel in governance, Whitefish Community Foundation offers free professional development and networking opportunities for nonprofit staff and board members through the Flathead Nonprofit Development Partnership (NpDP). In 2021, we offered monthly workshops focused on key areas of nonprofit management to improve oversight, transparency, accounting, governance, and more. We also hosted a quarterly gathering of nonprofit executive directors to foster peer-to-peer connectivity, support, and learning. NpDP programs are funded with support from the Dennis and Phyllis Washington Foundation, the Tamarack Foundation, and the NpDP Permanent Endowment Fund.

## SCHOLARSHIPS MAKING FUTURES BRIGHTER TOGETHER

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

Whitefish Community Foundation streamlines the entire process by helping individuals and businesses develop selection criteria, guiding candidates through the application process, and investing the scholarship fund with the objective of preserving value and fostering growth. We administer the program from start to finish, communicating with the schools and students. Our program is professionally managed and easily accessible to students through our online application.

### ACTIVE SCHOLARSHIP FUNDS:

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



CHANGING LIVES  
TOGETHER

**\$1M**

TOTAL AMOUNT  
RAISED SINCE  
INCEPTION IN 2020

## DAY OF GIVING & UNITY

Whitefish Community Foundation established Day of Giving & Unity in 2020 as a fundraising platform to help local nonprofits survive the economic turmoil created by COVID-19. As the pandemic continued to wreak havoc in 2021 and many nonprofits were forced to cancel their annual fundraising events for a second year in a row, Whitefish Community Foundation responded by organizing and hosting the 2021 Day of Giving & Unity in May. Once again, our community rallied together to support nonprofits as they continued to provide programs and services during a very challenging time. Over a 28-hour period, 1,100 donors participated in the campaign and helped raise \$476,655 for 92 nonprofits serving the Flathead Valley and Eureka. This amount included a \$1,000 matching grant from Whitefish Community Foundation to each participating organization that raised \$2,000 or more. We are grateful to our Circle of Giving members and the other donors who not only made the match possible, but stepped forward once again to extend a helping hand to community members in crisis.

**92**  
NUMBER OF  
BENEFITING  
NONPROFITS

**\$476,655**  
TOTAL  
AMOUNT  
GRANTED

**28**  
HOURS  
OF GIVING  
IN CAMPAIGN

**\$1,000**  
MATCHING GRANT  
TO EACH QUALIFYING  
NONPROFIT

### TOTAL AMOUNT FOR EACH NONPROFIT INCLUDING MATCH:

Abbie Shelter .....	\$16,260	Flathead Warming Center .....	\$9,110	Nate Chute Foundation .....	\$4,915
Alpine Theatre Project .....	\$15,835	Flathead Youth Home .....	\$3,600	North Valley Food Bank .....	\$6,515
Amazing Place Music .....	\$5,469	Foy's to Blacktail Trails .....	\$5,980	North Valley Hospital Foundation .....	\$3,375
Backpack Assistance Program .....	\$7,380	Friends of the Flathead Avalanche Center .....	\$3,340	North Valley Music School .....	\$10,015
Big Brothers Big Sisters NW Montana .....	\$6,025	Gateway to Glacier Trail .....	\$5,276	Northwest Montana Historical Society .....	\$10,105
Big Mountain Commercial Association .....	\$3,285	Glacier Children's Museum .....	\$3,658	Northwest Montana Lookout Association .....	\$3,970
Bigfork Art and Cultural Center .....	\$3,455	Glacier Hockey Association .....	\$4,100	NW Montana Veterans Food Pantry .....	\$3,445
Bob Marshall Wilderness Foundation .....	\$5,395	Glacier Institute .....	\$4,303	Project Whitefish Kids .....	\$7,170
Boys and Girls Club of Glacier Country .....	\$5,605	Glacier Nordic Club .....	\$5,190	Ravenwood Natural Science Center .....	\$3,595
CASA for Kids .....	\$12,810	Glacier Queer Alliance .....	\$7,209	Samaritan House .....	\$8,195
Center for Restorative Youth Justice .....	\$6,030	Glacier Skate Academy .....	\$4,680	Serious JuJu Skate Works .....	\$6,156
CF-WF High School Swim Teams .....	\$1,200	Glacier Symphony & Chorale .....	\$5,917	Shepherd's Hand Free Clinic .....	\$5,830
Child Bridge .....	\$8,165	Good Grief Group .....	\$4,860	Shining Honor Project .....	\$650
Children's House Montessori School .....	\$3,410	Habitat for Humanity of Flathead Valley .....	\$6,250	Sparrow's Nest of NW MT .....	\$12,930
Climate Smart Glacier Country .....	\$3,340	Hockaday Museum of Art .....	\$4,485	Stumptown Art Studio .....	\$3,515
Code Girls United .....	\$5,210	Homeward for Heroes .....	\$6,360	Summit Independent Living .....	\$1,020
Columbia Falls School Distr Bookmobile .....	\$5,100	Housing Whitefish .....	\$3,285	The Nurturing Center .....	\$1,230
Conrad Mansion Museum .....	\$4,690	Humane Society of Northwest Montana .....	\$5,985	Undaunted Family Connections .....	\$3,635
Creative Arts Council .....	\$3,720	Immanuel Foundation .....	\$9,500	Whitefish Community Center .....	\$4,095
Discovery Developmental Center .....	\$5,484	Kalispell Contemporary Arts Center .....	\$3,350	Whitefish Community School .....	\$925
DREAM Adaptive Recreation .....	\$6,735	Kalispell Education Foundation .....	\$4,290	Whitefish Dog Park .....	\$5,770
Farm Hands-Nourish the Flathead .....	\$6,855	Kalispell School District HEART Program .....	\$3,775	Whitefish Firefighters Association .....	\$3,085
Farming for the Future Academy .....	\$1,670	KittyMOM's Rescue Organization .....	\$4,270	Whitefish Lake Institute .....	\$3,505
Flathead Area Mountain Bikers .....	\$5,805	Lighthouse Christian Home & Services .....	\$7,610	Whitefish Legacy Partners .....	\$4,820
Flathead Audubon Society .....	\$4,565	Montana Conservation Corps .....	\$4,235	Whitefish Review .....	\$5,915
Flathead Cancer Aid Services .....	\$3,560	Montana Kayak Academy .....	\$1,400	Whitefish Rotary Charitable Fund .....	\$4,200
Flathead Food Bank .....	\$9,350	Montana State Parks Foundation .....	\$3,655	Whitefish School District Education Fdn .....	\$3,820
Flathead Land Trust .....	\$7,765	Montana Wild Wings Recovery Center .....	\$4,730	Whitefish Theatre Company .....	\$7,360
Flathead Lutheran Bible Camp .....	\$8,370	Montana Youth Diabetes Alliance .....	\$8,825	Wings Regional Cancer Support .....	\$4,176
Flathead Valley Ski Education Fdn .....	\$960	My Glacier Village .....	\$1,945		



through  
LEGACIES



## LEGACY SOCIETY

A Legacy Society is one of the most critical programs to a nonprofit's future. Legacy Societies are the foundation and strength a nonprofit can build upon for future generations. Whitefish Community Foundation works with many donors to establish legacies to leave to their communities and nonprofits. Whitefish Community Foundation manages Legacy Funds and ensures they are prudently invested and spent.

- Anonymous (5)
- Carol and Richard Atkinson
- Mary Van Buskirk and Roger Barber
- Dorothy and Luther Campbell
- Jane Kollmeyer and Terry Chute
- Anne and John Collins
- Tanya and Judah Gersh
- Cynthia Granmo
- Connie and Jake Heckathorn\*
- Joaquenia and Klaus Heinrich
- Thomas A. Hughes, III
- Barbara and Mike Jenson
- Herbert Kameon Trust\*
- John Kramer Jr.
- Janice and Paul McCann
- Rhona and Jerry Meislik
- Blake Reese Memorial Legacy Endowment
- Susan and Henry Ricklefs
- Dean A. Robbins (Wiley Homestead)
- SBB Fund
- M & S Schmidt Fund
- Doris Schumm\*
- Janna and Jamie Shennan
- Dave Stewart
- Mary Jane and Russ Street\*
- Jordan and Travis Taylor
- Virginia Weldon
- Susan and John Witt

\*Deceased

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

## LEGACY FUNDS

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

You can make a bequest in your will and connect it to a Legacy Fund at WCF. The Community Foundation will set up a permanent fund designated to your favorite charities and distributed according to your wishes.

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



*"It is comforting to know that our gift will continue to have a positive impact on children's lives long after we both are gone."*

### Mark Schmidt, Legacy Society

*"I moved to Whitefish in 1965 to be a ski instructor and fell in love with the entire Flathead Valley. For several years, I enjoyed teaching people to ski, and in the summers, I worked for the Forest Service, packing supplies into the Bob Marshall Wilderness by mule trains. Eventually I decided I needed a full-time career, so I started a business building specialty homes. Soon after, I met the love of my life, Shirley, and we married in 1981.*

*Shirley and I purchased land and developed a mobile home court south of Whitefish, which we managed for many years. We also purchased land on the Whitefish River and built our home there. We enjoyed many hobbies together, including gardening, traveling, and showing mules in driving contests around the country. As our business grew, we found great joy in giving back to the community that had received us so warmly.*

*Shirley and I were passionate about helping charities that assist children. I served on the North Valley Food Bank Board of Directors for 16 years and also dedicated many hours to cutting and wrapping wild meat and delivering groceries to those who needed help.*

*Cancer took Shirley's life in 2019. After her passing, I decided to establish a Legacy Fund with Whitefish Community Foundation to ensure a perpetual source of funding for the charities that were near and dear to our hearts. It is comforting to know that our gift will continue to have a positive impact on children's lives long after we both are gone."*



through  
GIVING

# DONOR ADVISED FUNDS

## WHAT IS A DONOR ADVISED FUND?

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

## DONOR ADVISED FUNDS BY THE NUMBERS:

**\$29M**

AWARDED THROUGH DONOR ADVISED FUND PROGRAM SINCE 2000

**\$3M**

AWARDED IN 2021,  
A 33% INCREASE OVER 2020

**58**

DONOR ADVISED FUNDS IN 2021

**ENGAGE YOUR FAMILY**

**GIVE WITH FLEXIBILITY**

**GIVE WITH CONFIDENCE**

**GIVE WITH ANONYMITY**

**ESTABLISH A LEGACY**

Donations you make to Whitefish Community Foundation qualify for the maximum available charitable deduction in the year the gift is made.

Establish a Donor Advised Fund and distribute the gift over time.



# TYPES OF FUNDS AT WHITEFISH COMMUNITY FOUNDATION

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



## ENDOWMENT FUNDS

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

**\$15,000\***



## DESIGNATED FUNDS

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

**\$5,000\***



## DONOR & CORPORATE ADVISED FUNDS

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

**\$5,000\***



## AGENCY FUNDS

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

**\$5,000\***



## SCHOLARSHIP FUNDS

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

**\$50,000\***

\*minimum to open

## ENDOWED VS. NON-ENDOWED FUNDS

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

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

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

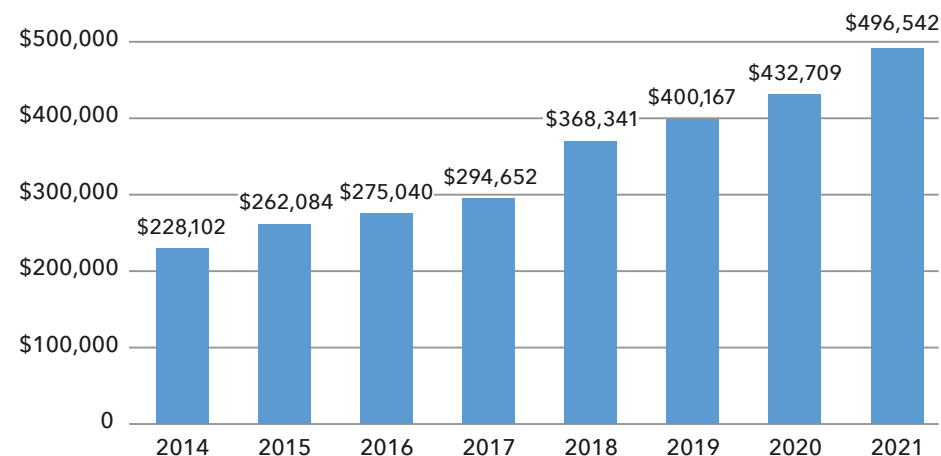


SUSTAINABILITY

## BUILDING ENDOWMENTS FOR NONPROFIT SUSTAINABILITY

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

### 8 YEAR GROWTH OF SUPPORT TO NONPROFITS



The **MONTANA QUALIFIED ENDOWMENT CREDIT** helps build charitable endowments while offering donors a federal income tax deduction and a state tax credit. The tax credit, renewed by the Montana State Legislature through 2025, allows donors to earn up to \$10,000 in a state income tax credit (\$20,000 if filing jointly). Donors can benefit an existing nonprofit endowment fund or start a new endowment for a nonprofit. Donors can also start a named endowment fund that can be built up and passed down to family for generational giving. **If you would like to learn how the Montana Qualified Endowment Credit could work for you, call us at 406-863-1781.**

### NONPROFIT ENDOWMENTS HELD BY WCF

- Abbie Shelter Endowment Fund
- Alpine Theatre Project Endowment Fund
- Back Country Horsemen Endowment Fund
- Bob Marshall Wilderness Fdn Endowment Fund
- CASA for Kids Endowment Fund
- Center for Restorative Youth Justice Endowment Fund
- Child Bridge Endowment Fund
- First Presbyterian Church Endowment Fund
- Flathead Audubon Society Endowment Fund
- Flathead Food Bank Endowment Fund
- Flathead Shelter Friends Endowment Fund
- Foy's To Blacktail Trail Maintenance Endowment Fund
- Glacier National Park Conservancy Endowment Fund

- Glacier Nordic Club Endowment Fund
- Glacier Symphony and Chorale Endowment Fund
- Habitat for Humanity Endowment Fund
- Hockaday Museum of Art Endowment Fund
- Human Therapy on Horseback Endowment Fund
- Humane Society of NW MT Endowment Fund
- Logan Health-Whitefish Endowment Fund
- Montana State Parks Foundation Endowment Fund
- Nate Chute Foundation Endowment Fund
- Nonprofit Development Partnership Endowment Fund
- North Valley Food Bank Endowment Fund
- North Valley Music School Endowment Fund
- North Valley Music School Youth Schlr Endowment Fund

- Patrol Fund
- Shepherd's Hand Endowment Fund
- Smith Fields Endowment Fund
- Stumptown Art Studio Endowment Fund
- Stumptown Historical Society Endowment Fund
- WAG Endowment Fund
- WAVE Endowment Fund
- Whitefish Community Foundation Endowment Fund
- Whitefish Community Library Endowment Fund
- Whitefish Education Foundation Endowment Fund
- Whitefish Library Association Endowment Fund
- Whitefish Theatre Company Endowment Fund
- Whitefish Trail Endowment

**44**  
NUMBER OF  
ENDOWMENTS  
HELD BY WCF

**\$496,542**  
IMPACT IN 2021

**\$2.75M**  
IMPACT SINCE 2014

**MONTANA  
QUALIFIED  
ENDOWMENT  
CREDIT**



### North Valley Music School

*"Music has the power to change lives and our community. The partnership between North Valley Music School and Whitefish Community Foundation makes this possible. North Valley Music School has two endowment funds managed by the Foundation. One fund provides financial security for general operating costs, and a second fund is restricted to youth scholarships, ensuring that music education programs will be available and accessible to all ages for years to come. The result of a healthy and growing endowment is the long-term sustainability of our nonprofit music school, a win for the entire community!"*

*North Valley Music School is grateful to Whitefish Community Foundation for its expert fiscal management and for ensuring steady growth of the principal and a reliable annual disbursement. From all the students, faculty, staff, and leadership at North Valley Music School, thank you for helping our organization grow and thrive."*

-Deidre Corson, Executive Director, North Valley Music School



# CORPORATE PHILANTHROPY

## GIVING BACK TO OUR COMMUNITY

### WHITEFISH MOUNTAIN RESORT

**\$1.3M**

AWARDED TO BENEFIT LOCAL NONPROFITS SINCE INCEPTION IN 2002

**\$91,000**

SUPPORTED LOCAL NONPROFITS IN 2021

**\$24,700**

SUPPORT FLATHEAD VALLEY 5TH GRADE SKI PASS PROGRAM AND DREAM ADAPTIVE RECREATION'S ADAPTIVE WINTER PROGRAMS

**70**

NUMBER OF GRANTS AWARDED TO LOCAL NONPROFITS IN 2021

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 Whitefish Community Foundation. The program is a major source of funding for DREAM Adaptive Recreation's winter programs and supports the 5th Grade Ski Pass Program, which expanded to cover all 5th graders in the Flathead Valley.

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

Brian Schott



WHITEFISH LAKE GOLF CLUB

### WHITEFISH LAKE GOLF CLUB

The **PATRON GOLF PASS PROGRAM** is a partnership between the Whitefish Lake Golf Club and Whitefish Community Foundation. Donors in the program are entitled to either a transferable pass or two individual season passes and other benefits. Since inception in 2007, over **\$162,000** from the sale of golf passes has supported the Community Foundation's charitable work to benefit our communities.

**Thank you Patron Golf Pass holders, Whitefish Lake Golf Club, Pro Shop, and Whitefish Lake Restaurant for your continued support for our community!**

Brian Schott





## IN MEMORIAM

### CONNIE HECKATHORN (1928-2021)

The Flathead Valley continues to benefit from the generosity of Connie Heckathorn, a longtime Whitefish resident who committed her life to helping others through volunteer and public service. Connie passed away on March 19, 2021, nearly 70 years after moving to Whitefish with her husband Jake. Her lifetime achievements are numerous and include being one of the first women to graduate from the University of Montana's School of Law, serving as the first Assistant Attorney General of the State of Montana, and co-founding Whitefish Community Foundation. She served three terms on the Whitefish School board and 10 years on the Whitefish Library board. She was also instrumental in the creation of the O'Shaughnessy Center and a new library in the late 1990s.

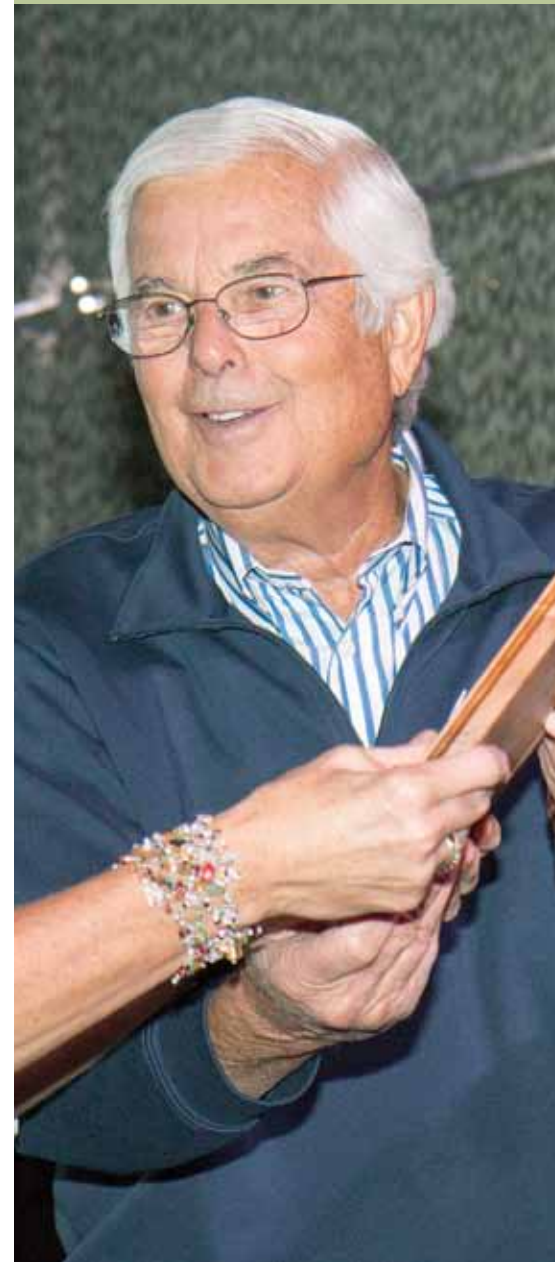
In a 1987 interview with the Whitefish Pilot, Connie said, "I like the challenge and solving problems, but most of all I really enjoy working with people and being involved."

Connie co-founded Whitefish Community Foundation in 2000 with Mike Jenson, John Kramer, Roxanne Rogers, and Dave Stewart. She rolled up her sleeves alongside the other founders and did whatever was necessary to ensure the success of the fledgling foundation, including funding some of the first grants out of her own pocket. She remained active with Whitefish Community Foundation for many years after she stepped off the board.

"Having worked with Connie on other committees I was very pleased that she joined the first Foundation board," co-founder Dave Stewart said. "She was enthusiastic and bright, but with her legal training, also quite realistic in what could be achieved. Her common sense approach was a great asset to us."

One year after her passing, Connie is still making a difference in the community she loved. Whitefish Community Foundation recently received a gift of \$300,000 for our Permanent Endowment Fund from the estate of Jake and Connie Heckathorn.

Connie's generous bequest to the Community Foundation is a gift to the place she cared about so deeply. Her gift will perpetuate our work to support and strengthen local nonprofits into the future.



### WILLIAM J. "BILL" HOWARD (1930-2022)

William J. "Bill" Howard was a very dear friend of the Whitefish Community Foundation. Bill passed away from cancer on January 10, 2022 at the age of 82. Bill was bigger than life and very passionate about helping those less fortunate. He did not fear hard work. He married the love of his life, Jean, and had three wonderful children, Brad, Leslie, and Steve. With a young family at home, Bill attended night school while holding down a day job as a delivery driver. He went on to receive his law degree from Western State University (WSU) College of Law. His legal career eventually led to opening his own firm and then later partnering with his son Brad to form Howard and Howard. He served as President of the Orange County Trial Lawyers Association and taught classes at WSU.

After retiring from a long, successful career as a trial lawyer, Bill bought a summer home in Whitefish and enjoyed spending time with his family and friends hiking in Glacier, boating on Whitefish Lake, rafting and fishing the Flathead River, and golfing at Whitefish Lake Golf Club.

Bill became very active with Whitefish Community Foundation around 2006, supporting the Foundation's operations and as an early member of the Patron Ski Pass Program. He became a tremendous force behind the success of the annual Duck Derby, a fundraiser for the Community Grants Program from 2009 to 2014. Bill could often be seen wearing a Duck Derby t-shirt and toting derby tickets for sale. On three occasions, he earned the Golden Duck Award for selling the most "Big" ducks—he averaged over 100 ducks a year. Bill would not take no for an answer!

In 2015, the Community Foundation sent the ducks down the river for good and moved on to organize the Great Fish Community Challenge. Bill was right there to support the new program wearing Great Fish t-shirts. Bill was an inaugural member of the Circle of Giving that formed in 2014, a program that is the backbone to all the Foundation's grant programs. Bill was also a member of the Foundation's Advisory Board from 2011 to 2016.

In 2016, Bill lost his beloved wife of 56 years to cancer. This led him to establish the Jean Howard Memorial Award, a special award accompanied by a \$5,000 grant, presented annually to a Flathead Valley nonprofit. Going forward, this special award will be called the Jean and Bill Howard Memorial Award, and the recipient will be selected by the Howard family.

Bill's tremendous energy, enthusiasm, and can-do attitude will be dearly missed, but most especially his smile.

## IN MEMORY OF:

Michael Bennett  
Marilyn Brown  
Mike Gwiazdon  
Jean Howard  
Mike Jackson  
Joan "Jo" Newton

Dori Schumm  
Carolyn Doney Smith  
Karen Spangler  
Richard Tinkler  
Jim Welch



Brian Schott

# 2021

## BY THE NUMBERS

### COMPOSITION OF ASSETS 2021 YEAR END

As of December 31	2021	2020
Total Assets	\$55,978,000	\$41,799,000
Total Contributions	\$16,608,000	\$8,743,000
Total Grant Distributions	\$9,438,000	\$8,208,000

#### HIGHLIGHTS

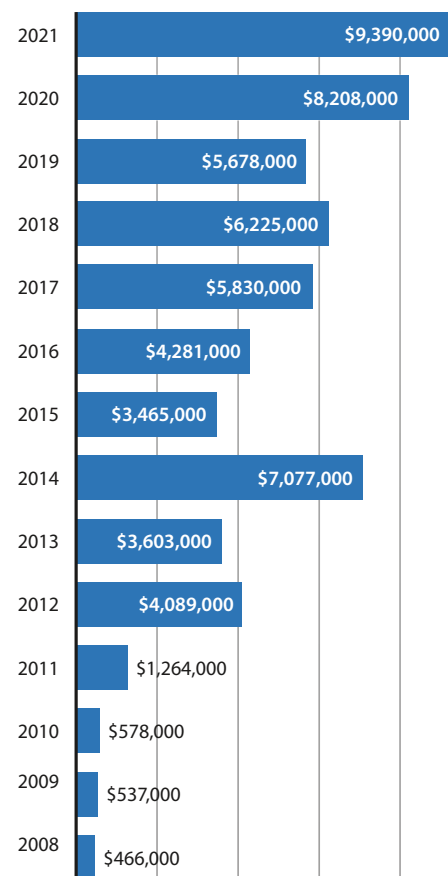
**1,855**  
NUMBER OF  
GRANTS AWARDED

**286**  
NUMBER OF NONPROFIT  
RECIPIENTS

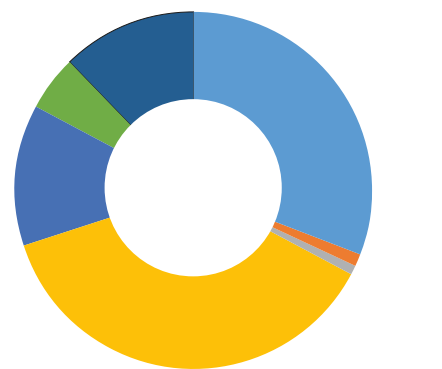
**\$5,088**  
AVERAGE GRANT  
AMOUNT

**\$33,003**  
AVERAGE PER  
NONPROFIT

#### GROWTH IN GRANTING

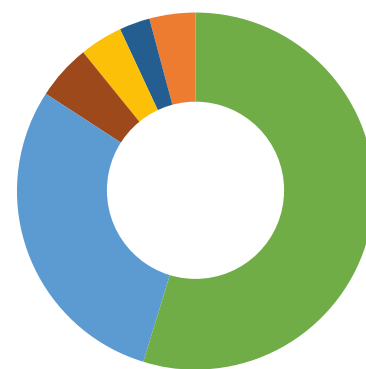


#### GRANTS DISTRIBUTIONS BY FUND TYPE



- Donor Advised Funds, 31%
- Agency Funds, 1%
- Scholarships, 1%
- Great Fish Designated Funds, 37%
- Designated Funds, 13%
- Endowment Funds, 5%
- WCF Community Grant Programs, 12%

#### TOTAL ASSETS BY FUND TYPE



- Advised, 56%
- Endowed, 28%
- Designated, 5%
- Annuity, 4%
- WCF Grants, 3%
- Operating, 4%

#### INVESTMENT COMMITTEE

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

David Dittman  
Whitefish Market President  
First Interstate Bank

Greg Garrison  
Retired | PricewaterhouseCoopers COO

Jay Latimer  
Retired Entrepreneur

Linda Maetzold  
Business Owner | Buffalo Café

Mike Shaw  
Retired Forester

Jamie Shennan  
Venture Capital | Trinity Ventures

Ken Wessels  
Retired, CEO | Wessels, Arnold & Henderson

John Witt  
Retired | Bill Matrix Corporation

#### FINANCIAL MANAGERS DISCLOSURE

Investment Manager:  
Mason Investment Advisory Services

Custodian: TD Ameritrade

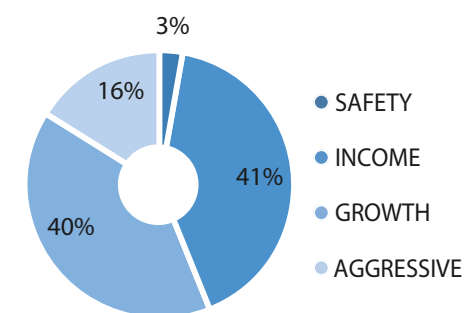
CPA: Sallie Brown,  
JCCS, CPAs, PC, Whitefish

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

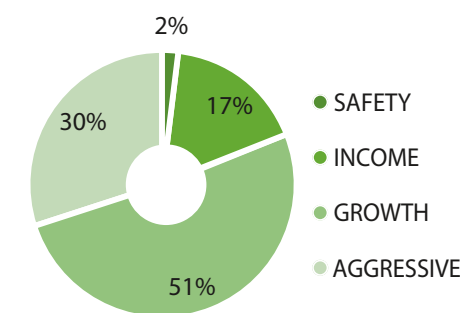
The Whitefish Community Foundation operates under section 501(c)(3) of the Internal Revenue code as a public charity I.D. #81-0533002. Review annual 990 report at [whitefishcommunityfoundation.org](http://whitefishcommunityfoundation.org)

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

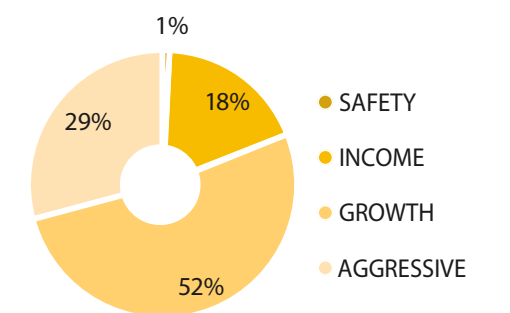
#### BALANCED POOL ALLOCATION



#### ANNUITY POOL ALLOCATION



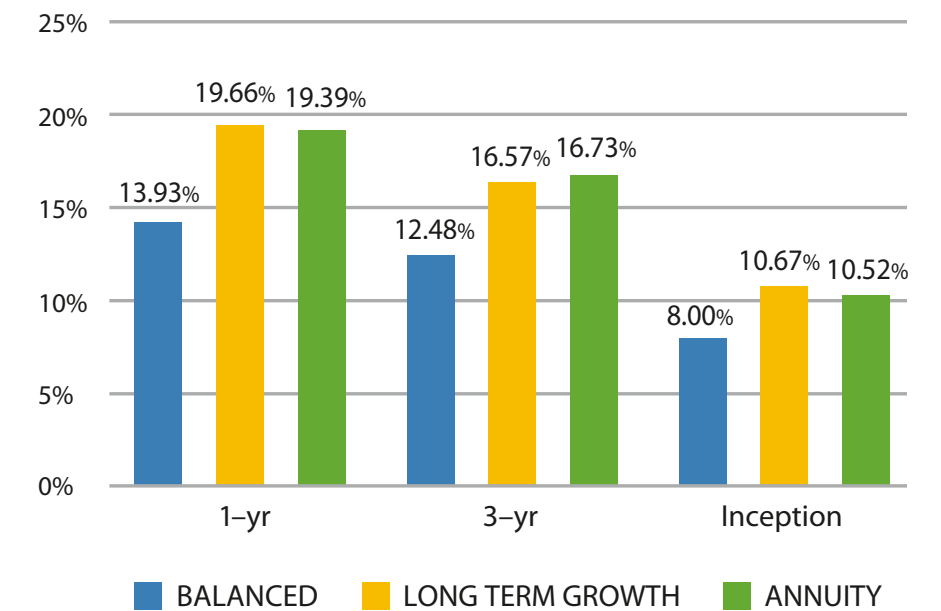
#### LONG-TERM GROWTH ALLOCATION



## FINANCIAL STEWARDSHIP

At Whitefish Community Foundation, we take seriously our responsibility to be good stewards of the community assets and donor funds entrusted to us. Our Investment Committee and staff work closely with our investment advisors, Mason Investment Advisory Services, to ensure that all assets invested are consistent with the policies and objectives of the Foundation. Our objectives are to invest our assets so that grants can be made to address current community needs, and to preserve and enhance assets available for future generation grantmaking. We achieve this through investment in a diverse portfolio designed to maximize returns while minimizing risk and volatility.

### INVESTMENT RETURNS (ANNUALIZED)



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

Anonymous (5)  
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Thank you for helping us make a difference in our community. We are changing lives together! The following donors gave directly to Whitefish Community Foundation programs:

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\* Indicates donors who have made a charitable contribution annually for the past 5 consecutive years. **Bold\*** indicates donors who have made a charitable contribution annually for the past 10 consecutive years.

Organizations that participate in the Great Fish Community Challenge collectively receive over 9,000 gifts and are encouraged to acknowledge their donors directly. In this report, Whitefish Community Foundation recognizes donors who make gifts that specifically support the Community Foundation and its grant programs.



LEADERSHIP

through

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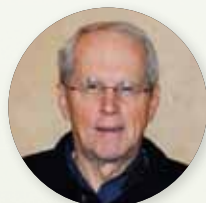
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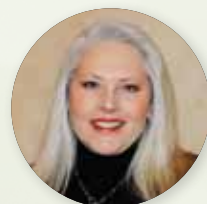
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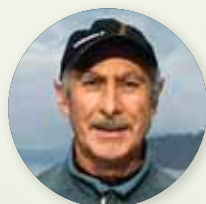
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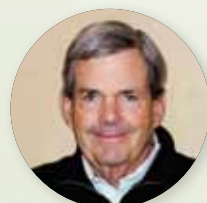
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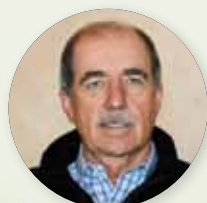
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# GIVING TOGETHER



Heidi Desch

(Left to right): Lynnette Donaldson,  
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(Former Donor Services Associate),  
and Jill Seigmund

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Giving Together for the Flathead Valley

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Excellence. Accountability. Impact.™

### Foundations National Standards Compliant

National Standards establish legal, ethical, and effective practices, and assure donors, government, and media of our commitment to best practices. To achieve this certification, community foundations go through a rigorous peer review of organizational and financial policies and procedures. Community foundations use these standards to promote self-regulation and set consistent expectations for their boards. These standards provide a framework for best practices.

**Photos: Front/Back Cover:**  
Danny Nestor, Bibler Gardens, Kalispell  
Designed and originally tended  
by Louis A. "Sam" Bibler, Bibler Gardens in  
Kalispell is open to the public each spring  
and summer. For more information,  
visit [www.biblergardens.org](http://www.biblergardens.org).

**Graphic Design:** Robin Sorg, LLC.

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Giving Together for the Flathead Valley