



# TOGETHER WE GROW

2023 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.

# 2023 ANNUAL REPORT



## TABLE OF CONTENTS

From the Board Chair.....	2
Community Impact.....	2
From the President/CEO.....	3
Circle of Giving .....	4-7
Great Fish Community Challenge .....	8-9
Special Awards.....	10-11
Community Grant Program .....	12-13
Major Community Project Grants .....	14-15
Micro Grants and Emergency Response Grants.....	15
Kids Fund Grants .....	16-17
Nonprofit Development Program .....	18
Building Endowments.....	19
Montana Endowment Tax Credit.....	20-21
Legacy Society .....	22
Types of Funds .....	23
Donor Advised Funds .....	24-25
Scholarships .....	26-27
Corporate Philanthropy .....	28-29
By the Numbers .....	30
Investment & Financial Stewardship.....	31
Donor Recognition .....	32-34
In Memoriam .....	35
Leadership.....	36-37

## COMMUNITY IMPACT

**\$83M**

CUMULATIVE GRANTS TO  
NONPROFITS SINCE 2000

**\$37.5M**

TOTAL DONOR ADVISED  
GRANTS TO NONPROFITS  
SINCE 2000

(more on page 24)

**\$28M**

GRANTED THROUGH  
THE GREAT FISH  
COMMUNITY CHALLENGE  
SINCE 2015

(more on page 8)

**\$2.67M**

COMMUNITY GRANTS  
AWARDED SINCE 2000

(more on page 12)

**\$854,000**

MAJOR COMMUNITY  
PROJECT GRANTS  
AWARDED SINCE 2010

(more on page 14)

## FROM THE BOARD CHAIR THANK YOU FLATHEAD VALLEY.

Dear Friends and Supporters,

The year 2023 marked a period of transition and adaptation for both our organization and the communities we serve. Amidst the new post-pandemic landscape, nonprofits and community leaders are adjusting to a new baseline and laying the groundwork for a brighter future.

I firmly believe that Whitefish Community Foundation plays a critical leadership role within our nonprofit community to provide the resources, training, and funding that can help community-led initiatives become reality.

Central to this narrative of growth and progress was our own leadership transition last year. With energy and enthusiasm, Alan has fully immersed himself in our mission, inspired donors to give, and further invigorated our nonprofit community. His leadership has also opened our eyes to new horizons of possibility.

Our journey forward is guided by a shared commitment to improve the entire Flathead Valley, deepen our impact, and nurture a culture of philanthropy that transcends boundaries. At the heart of our mission is the unwavering dedication of our donors, volunteers, and nonprofits who work tirelessly to meet the growing needs of our community. Your continued belief in our mission fuels our endeavors and empowers us to effect lasting change.

On behalf of our Board of Directors and staff, I am thrilled to present our 2023 Annual Report which highlights local voices and heartfelt impact stories from the previous year. Our total assets, contributions, and granting grew to record highs, and we are ideally positioned for the road ahead.

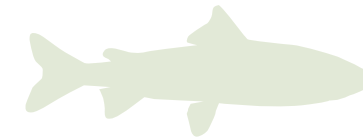
As we embark on this journey, we extend our deepest gratitude to each and every one of you for your steadfast commitment and unwavering support.

**Together, we grow.**

With heartfelt appreciation,



Greg Garrison  
Board Chair



## FROM THE PRESIDENT/CEO

Over the past year, I have had the pleasure of meeting so many new people –donors and dedicated nonprofit staff and volunteers—who all share a common love for the Flathead Valley. The authenticity of the people and the sheer beauty of the surrounding landscapes are both what draw us here and ultimately what keep us here. During those conversations, I have been asked more times than I can count, “What is Whitefish Community Foundation?” The answer is actually quite simple, and our single-most defining characteristic is in our name: *community*.

Our \$61 million in assets do not represent the riches of one individual or corporation but instead represent the aggregate of our community voices.

**We manage community dollars to help solve community issues.** The Flathead Valley is undeniably special, and Whitefish Community Foundation works directly with donors, community leaders, and nonprofits to help keep it that way.

We have become the second largest community foundation in Montana, thanks to YOU—our generous donors—who give year after year to meet the growing needs of our community. Our work would not be possible without your continued trust and commitment, and for that, we are truly thankful.

As our community grows, so will we. Let’s continue giving together for the Flathead Valley.



Alan Davis  
President/CEO



TOGETHER WE  
GROW

through

GENEROSITY



## CIRCLE OF GIVING

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

**\$1,909,451**

DONATED TO THE CIRCLE  
OF GIVING PROGRAM IN 2023

**32**

NEW CIRCLE MEMBERS IN 2023

**\$10,654**

AVERAGE GIFT SIZE IN 2023

### 2023 ALLOCATION:



### DIRECT GRANTS TO LOCAL NONPROFITS

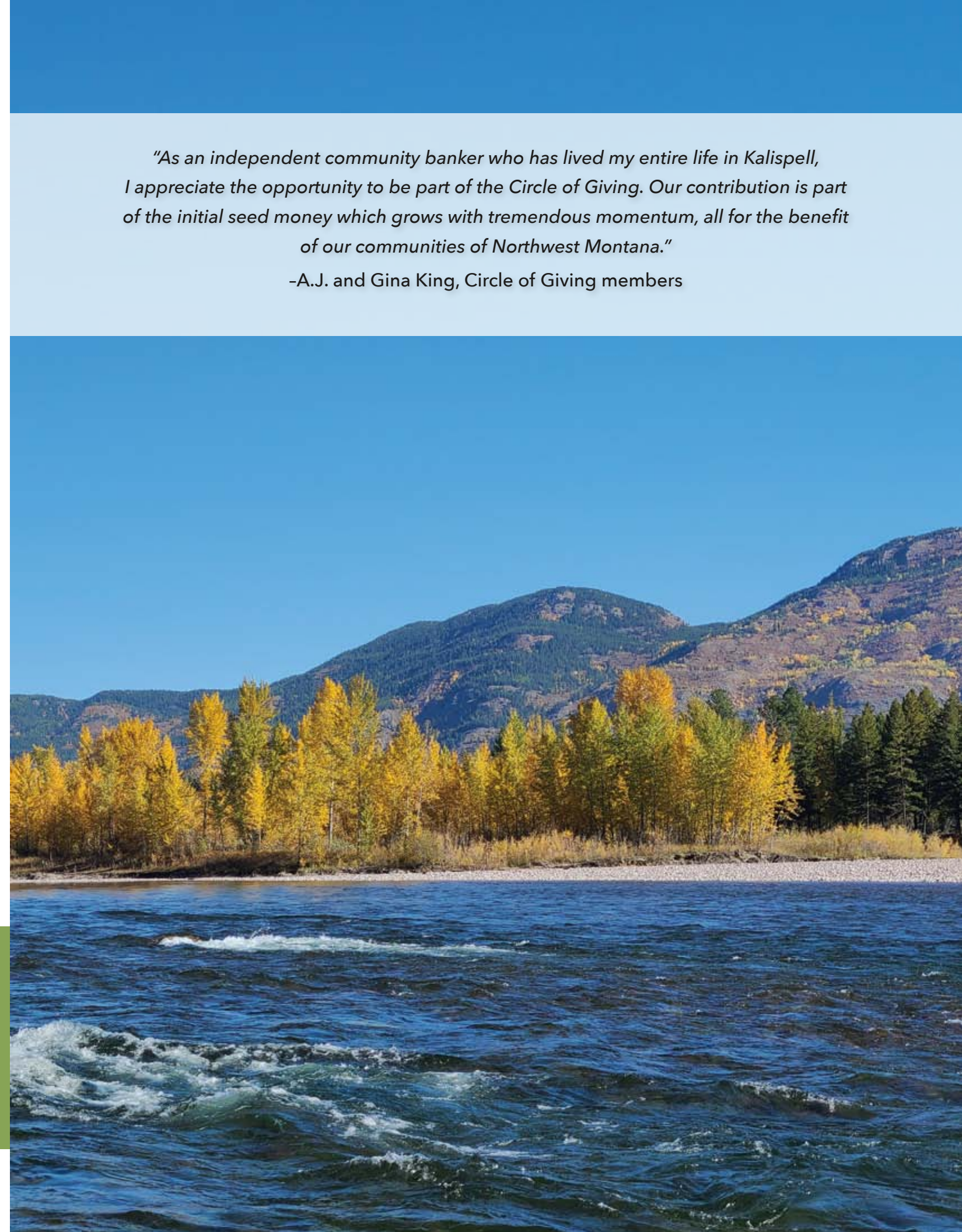
The Circle of Giving is the backbone of all of the Foundation's grant programs, including the Great Fish Match Fund, Community Grant Fund, Major Project Grant Fund, Emergency Response Fund, and Micro Grant Fund.

### WHITEFISH COMMUNITY FOUNDATION

The Circle of Giving is the engine that keeps Whitefish Community Foundation running. Funding supports direct costs to host the Great Fish Community Challenge and our Nonprofit Development Program. All administrative overhead costs are covered by the Foundation's annual endowment distribution.

*"As an independent community banker who has lived my entire life in Kalispell, I appreciate the opportunity to be part of the Circle of Giving. Our contribution is part of the initial seed money which grows with tremendous momentum, all for the benefit of our communities of Northwest Montana."*

-A.J. and Gina King, Circle of Giving members



*"We owe our livelihood to the community of Northwest Montana, having served Flathead and Lincoln counties for 40 years as small business owners. Being a part of the Circle of Giving is the best way for us to give back to the community that we are fortunate to call home."*

-Brian and Marie Clark, Circle of Giving members



# THANK YOU TO OUR CIRCLE OF GIVING MEMBERS

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



Anonymous (3)  
 Kate and Chip Andrews  
 Brent Appelgren  
 Valerie and Beau Armstrong  
 Jo-Ann and Jim Armstrong  
 (Kiita Foundation)  
 Mary Dojnik and IV Ashton  
 Lisa and Bob Bailey  
**Julie and Summerfield Baldrige**  
 Ledjie and Phillip Ballard  
**Sharon and Dean Baltzell**  
**Charlene and Stephen Barasch**  
 Trish and Rick Bartoskewitz  
**Dee and Jim Beightol**  
 Tierney and Jon Beizer  
 Linda and Terry Bell  
 Bonnie and Rick Billuni  
**Mary Ann and Bill Bindley**  
 Lannette and Todd Bloom  
 Tara and Matt Brister  
**Beth and Jerome Broussard**  
**Rockwood Brown**  
 Karen and Ethan Budin  
 Ann and Brad Bulkley  
 Lindsey and Todd Burris  
**Eileen Bocci Campbell**  
**Dorothy and Luther Campbell**  
 Missy and Pat Carloss  
**Maureen Casey**  
 Chrest Foundation  
**Jane Kollmeyer and Terry Chute**  
 Marie and Brian Clark  
 Lauren Sparks and Ron Clearwater  
 Nadine and Braydon Coburn

Dyan and Michael Colby  
 Liz and Stewart Coleman  
**C.K. and Jim Coles**  
**Linda Cornutt**  
 Stacy and Michael Covey  
 Felice and Dow Crocker  
**Katherine and Gordon Cross**  
 Beverly and Larry Dale  
 Nicci and J.D. Daniher  
 Scott Darkenwald  
**Candy and Eddie DeBartolo**  
 Jane and Gary Decker  
 Lynnette and Mark Donaldson  
 Myra and Michael Doyle  
 Nora and Blake Dunlop  
 Kate and Ross Dworman  
 Lynn and Ben Dykstra  
 Jennie and Andrew Eckstrom  
 Margaret Davis and Bruce Ennis  
 First Interstate BancSystem Fdn  
 Margaret Askew and Patrick Foley  
 Kate and Michael Fraser  
 Kirsten and Putt Fuller  
**Barbara Gallagher**  
**Laura and James Garbacz**  
**Kathy and Greg Garrison**  
 Janelle Gentry  
 Marion Gerrish  
 Jamie and Michael Goguen  
 Adele Goldberg  
**Cheryl Watkins and Dick Gordon**  
**Linda Engh-Grady and Dave Grady**  
 Cindy Granmo  
**Colleen and Peter Grant**  
 Cameron Blake and Sandy Gray  
 Jeanine and Ken Green  
 Perk and Jim Groschupf

**Jill and Chris Gwaltney**  
 Michelle and Cyrus Hadidi  
**Jes and John Hagale**  
 Hall-Halliburton Foundation  
 Mary Lloyd and Dick Harding  
**Stephanie and Fred Harman**  
 Sadie and Evan Harris  
 Margo and Gary Harrod  
**Shannon and Brian Haycox**  
 Kelly and Bob Hayes  
**Patty and Bob Hayes**  
 Iona McMillan and Dennis Heinzig  
 Jill and Grant Henderson  
 Lisa and Doug Hickok  
 Suzanne and Richard Hildner  
 Jim Hollensteiner  
 Margo Jacobs  
 Lou Anne and Jeff Jensen  
 Brenda and Jonny Jones  
 Robyn and Mark Jones  
 Ann and Bill Jones  
 Sharon and Bill Kahle  
 Melissa and Pierre Kaptanian  
 Melinda and Mike Kartsonis  
 Rachel Kelton  
 Gina and A.J. King  
**Maureen and John King**  
 Julie Williams and Marshal Kushniruk  
 Cindy and Tom LaChance  
**Mignon and Jay Latimer**  
**Gerry and Frank Leftwich**  
 Susan Stevenson and David Littleton  
 Maureen Bolton and Edwin Lojeski  
 Kristen Sramek and Josh Lozman  
**Allison and Rick Magnuson**  
 Janet Malone  
 Sarabeth and John Martin

## CIRCLE CHAMPIONS

These Circle of Giving members have given every year for the last 10 years.

AGL Foundation  
 Teri and Jeff Allen  
 Carol and Richard Atkinson  
 Cindy and Mogens Bay  
 Betsy and Bill Bayne  
 Sandy and Dick Boyce

**Jan Mayo**  
 Libby and Murray McCabe  
 Valeri and Allan McGarvey  
 Rhona and Jerry Meislik  
 Abbie Milisci  
**Lori Miller**  
 Emmy and David Montanye  
 Betty Monzingo  
**Ellen and Matt Moran**  
**Barbara Morris**  
 Gloria and Leif Nelson  
 Marilyn and Rick Nelson  
 Amy Johannes and Doug Newton  
 Terrie and Tom Nitopi  
 Pam and Randall Onstead  
 Claudine and T.C. Origitano  
 Val and Larry Parsons  
 Sandy and Dan Perl  
 Coco and Ross Pickert  
 Blanche Puffer  
**Nikki and Doug Reed**  
 Melinda and Rick Reed  
 Reggie's Quick Lube  
**Sue and Hank Ricklefs**  
 Katie and Mike Robinson

Janice and James Case  
 Anne and John Collins  
 Sarah and John Graves  
 Cindy and Joe Gregory  
 Ila B. Dousman Fund  
 Iron Horse Foundation  
 Barbara and Mike Jensen  
 Ann and Paul Jeremiassen  
 Jon McBride and John Kramer  
 Sherry and Dave Lesar  
 Linda and Charlie Maetzold

Laura Reynolds and Walter Rowntree  
 Kim and George Ruhana  
**Charlene Rygg**  
 Julie and Scott Sanderude  
 Mark Schmidt  
 Liz and Kevin Scholten  
 Jennifer and Tyler Seibert  
**Marie and Mike Shaw**  
 Marla and Van Shaw  
 Austine and Vassilis Siomos  
 Ashley and G. Stacy Smith  
 Jill and Kevin Smith  
 Linda Smith  
 Lucy Smith  
 Claudia and Samuel Smith  
 Martha and William Smith  
 Lisa and Jim Stack  
 Jen and Gus Stein  
 Margy and Rob Stevens  
 Kelly and Kim Stimpson  
 Lisa and Al Stinson  
**Nancy and David Stokes**  
 Summit Beverage  
 Meg and Chris Temple  
 Edie Tinkler

Quinn Family  
 Karen and Ron Rosenberg  
 Stacy Schlinger  
 Janna and Jamie Shennan  
 Carole and Roger Spragg  
 Lori and Robb Voyles  
 Dori and Bill Walton  
 Boots and Alan Warrick  
 Byrdie and Ken Wessels  
 Ardy and Steve Whisler  
 Susan and John Witt

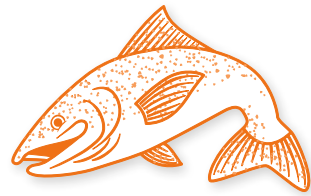
Tracy Foundation  
 Heather and Scott Tucker  
 Priscilla and Garrett Turner  
 Toni and Jim Turner  
 Morgan and Jack Tyler  
 Kristen and John VanDenburgh  
**Linda and Andy Viens**  
 Julie and Rob Waller  
**Katie and Ben Ward**  
**Leslie and Mike Warning**  
**Judy and David Williams**  
**Mary and Hal Williamson**  
**Bet and Doug Wise**  
 Debra Wolf

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

TOGETHER WE GROW

INSPIRATION

through



WCF provided a 62% match on the first \$20,000 raised by each nonprofit in 2023.

# GREAT FISH COMMUNITY CHALLENGE

The ninth annual Great Fish Community Challenge raised a record-breaking \$6,262,929 for 77 Flathead Valley nonprofits. The key to the Challenge's success is the Great Fish Match, made possible by our growing Circle of Giving and other donors who contribute. The Match inspires thousands of other donors to give, resulting in a 23% increase in funds raised during the Challenge in 2023. For many local nonprofits, the Challenge has transformed their organization by providing an efficient platform to build awareness, connect with new donors, and raise critical operating funds.

**\$28M**

RAISED SINCE INCEPTION IN 2015

**\$6,262,929**

RAISED IN THE 2023 CHALLENGE FOR 77 CHARITIES

**\$12,400**

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

**\$924,331**

TOTAL 2023 MATCH FUND

**23%**

INCREASE IN FUNDS RAISED THROUGH THE 2023 CHALLENGE OVER 2022

**\$329,528**

WCF COSTS TO HOST THE 2023 CHALLENGE



## TOTAL RAISED

BY THE NONPROFITS PARTICIPATING IN THE 2023 GREAT FISH COMMUNITY CHALLENGE INCLUDING THE MATCH AND SPECIAL AWARDS:

**\$6,262,929**

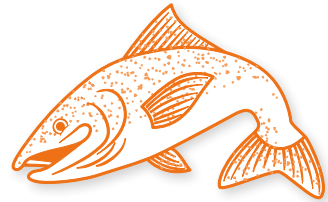
Abbie Shelter .....	\$172,423	Housing Whitefish.....	\$56,850
Amazing Place Music.....	\$56,670	Humane Society of Northwest Montana.....	\$81,531
Backpack Assistance Program.....	\$94,013	ImaginEL Library Foundation .....	\$167,640
Big Brothers Big Sisters NW Montana.....	\$47,780	Immanuel Foundation .....	\$38,915
Bigfork Art and Cultural Center .....	\$52,415	Kalispell Education Foundation .....	\$50,689
Bob Marshall Wilderness Foundation .....	\$61,615	Land to Hand.....	\$166,700
Boys & Girls Club of Glacier Country .....	\$59,107	Lighthouse Christian Home & Services.....	\$97,175
CASA for Kids.....	\$243,885	Logan Health Foundation .....	\$54,405
Center for Restorative Youth Justice.....	\$139,770	Logan Health-Whitefish Foundation.....	\$79,700
Child Bridge .....	\$137,030	Montana Conservation Corps .....	\$43,795
Children's House Montessori .....	\$33,880	Montana Kayak Academy .....	\$27,246
Code Girls United .....	\$98,056	Montana Youth Diabetes Alliance.....	\$30,171
Conrad Mansion Museum .....	\$26,517	Nate Chute Foundation.....	\$219,688
Creston Firefighters Association.....	\$35,734	North Valley Food Bank.....	\$208,521
DREAM Adaptive Recreation.....	\$260,421	North Valley Music School .....	\$366,962
Flathead Area Mountain Bikers.....	\$49,989	North West Montana Veterans Food Pantry .....	\$61,170
Flathead Audubon Society .....	\$40,200	Northwest Montana Community Land Trust.....	\$59,850
Flathead County Sheriff's Posse .....	\$25,159	Northwest Montana History Museum.....	\$48,835
Flathead Food Bank.....	\$124,743	Project Whitefish Kids.....	\$79,661
Flathead Industries .....	\$55,510	Ravenwood Outdoor Learning Center .....	\$36,335
Flathead Land Trust .....	\$102,325	Samaritan House.....	\$144,403
Flathead Rapids Youth Soccer.....	\$33,230	Shepherd's Hand .....	\$76,880
Flathead Rivers Alliance .....	\$26,191	Sparrow's Nest of NW MT.....	\$154,549
Flathead Valley Community College Foundation.....	\$75,524	Stumptown Art Studio .....	\$59,410
Flathead Valley Ski Education Foundation .....	\$34,295	Tamarack Grief Resource Center .....	\$23,774
Flathead Warming Center .....	\$114,199	The Nurturing Center .....	\$51,558
Flathead Youth Home.....	\$71,605	Two Bear Therapeutic Riding Center .....	\$48,435
Foy's to Blacktail Trails .....	\$44,980	Whitefish Community Center.....	\$56,425
Friends of the Flathead Avalanche Center .....	\$45,091	Whitefish Community Foundation.....	\$64,221
Gateway to Glacier Trails.....	\$44,539	Whitefish Dog Park .....	\$54,613
Glacier Hockey Association .....	\$22,980	Whitefish Firefighters Association .....	\$34,745
Glacier Institute .....	\$45,530	Whitefish Lake Institute .....	\$67,795
Glacier National Park Conservancy .....	\$105,449	Whitefish Legacy Partners.....	\$145,128
Glacier Nordic Club.....	\$59,503	Whitefish Review.....	\$47,985
Glacier Skate Academy .....	\$35,025	Whitefish School District Education Foundation .....	\$69,775
Glacier Symphony & Chorale .....	\$77,454	Whitefish Theatre Co. ....	\$156,995
Good Grief Group .....	\$64,270	Whitefish Veterans Support Team.....	\$60,965
Habitat for Humanity of Flathead Valley .....	\$63,248	Wings Regional Cancer Support .....	\$34,045
Hockaday Museum of Art .....	\$55,035		





through

EXCELLENCE



# SPECIAL AWARD WINNERS

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



## GREAT FISH AWARD \$7,500

### NATE CHUTE FOUNDATION

The Great Fish Award is given annually to an organization that demonstrates tremendous leadership and dedication toward advancing their mission and impacting critical needs in local communities. Nate Chute Foundation was selected as the 2023 Great Fish Award recipient for the organization's work to support, educate and empower the Flathead Valley to promote mental wellness and reduce suicide.

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

**WINGS REGIONAL CANCER SUPPORT** received the Jean and Bill Howard Memorial Award and an accompanying \$5,000 grant for the organization's dedication to helping defray out-of-pocket expenses associated with cancer treatment for Northwest Montana residents and their families.

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

**BIG MOUNTAIN FIREFIGHTERS ASSOCIATION** received the Russ and Mary Jane Street Community Service Award and an accompanying \$2,500 grant for the organization's efforts to purchase equipment and other necessary items for the Big Mountain Fire District.



Wings Regional Cancer Support, recipient of the Jean and Bill Howard Memorial Award



Code Girls United, recipient of the Doris Schumm Community Spirit Award

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

**CODE GIRLS UNITED** received the Doris Schumm Community Spirit Award and an accompanying \$2,500 grant for the organization's work to expand the future career opportunities of girls through hands-on experiences in coding, technology, and business.

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

**JIM HOLLENSTEINER** received the Connie Heckathorn "Cheers for Volunteers" Award for his decades of service to local nonprofits, including Northwest Montana History Museum, Flathead Lakers, Kalispell Rotary, and others. Jim selected **NORTHWEST MONTANA HISTORY MUSEUM** to receive the \$2,500 grant that accompanied the award.



Jim Hollensteiner (center), recipient of the Connie Heckathorn Cheers for Volunteers Award

### FOUNDERS LEADERSHIP AWARD \$2,500

**CAROL BIBLER** received the Founders Leadership Award for her exemplary service and leadership to local and regional conservation organizations over the years. Carol and her husband Jim Watson were instrumental in establishing Foy's to Blacktail Trails in 2005 and expanding Herron Park in 2007. A \$2,500 grant accompanied the award, which Carol directed to **FLATHEAD LAND TRUST** for the conservation of the Owen Sowerwine natural area.



Carol Bibler (left), recipient of the Founders Leadership Award

### CORPORATE CITIZENSHIP AWARD \$2,500

**FLATHEAD ELECTRIC COOPERATIVE** received the Corporate Citizenship Award for the company's leadership in philanthropy during the Great Fish Community Challenge and beyond. Flathead Electric Co-op encouraged company employees to donate to the Challenge by matching their contributions dollar-for-dollar. Flathead Electric Co-op selected **CASA FOR KIDS** to receive the \$2,500 grant that accompanied the award.



Flathead Electric Cooperative, recipient of the Corporate Citizenship Award

### TWENTY-YEAR CLUB

Whitefish Community Foundation recognized **15 FLATHEAD VALLEY RESIDENTS** who have served a local nonprofit organization for 20 years or more. The following individuals were inducted into the Twenty-Year Club for their long-term commitment to helping ensure the health and sustainability of a nonprofit organization:

- Carol Atkinson *Whitefish Community Foundation*
- Collette Box *Discovery Developmental Center*
- Heidi Clausen *Whitefish Theatre Co.*
- Melanie Drown *Stumptown Art Studio*
- Jack Eaton *Whitefish Theatre Co.*
- Sue Evans *FVCC Foundation*
- Linda Erickson *NW Montana Veterans Food Pantry*
- Brett Holmquist *Ravenwood Outdoor Learning Center*
- Mike Jenson *Whitefish Community Foundation*
- Mike Jopek *Whitefish Legacy Partners*
- John Kramer *Whitefish Community Foundation*
- Betty Jo Malone *Northwest Montana History Museum*
- Jesse Malone *Northwest Montana History Museum*
- Pam Saunders *Whitefish Theatre Co.*
- Chris Vick *Conrad Mansion Museum*

TOGETHER WE GROW

through

FUNDING



# COMMUNITY GRANT PROGRAM

The Community Grant Program was created in 2000 to have a broad impact on communities throughout the Flathead Valley. In 2023, the program was expanded to include nonprofits providing health and human services in Lincoln and Glacier counties.

Thanks to the Circle of Giving, Whitefish Community Foundation was able to award more than \$270,000 in Community Grants in 2023 to nonprofits representing the communities of Bigfork, Browning, Columbia Falls, Eureka, Evergreen, Hungry Horse, Kalispell, West Glacier, and Whitefish.

**41**  
NUMBER OF NONPROFITS RECEIVING  
A COMMUNITY GRANT IN 2023

**\$270,701**  
COMMUNITY GRANTS  
AWARDED IN 2023

**\$2.7M**  
COMMUNITY GRANTS  
AWARDED SINCE 2000

Flathead Rivers Alliance

WHITEFISH COMMUNITY FOUNDATION

# 2023 COMMUNITY GRANT AWARDS

- 406 for Kids - Support for families with kids undergoing medical treatment | \$5,000
- Abbie Shelter - Mental health therapy | \$10,000
- Bigfork ACES - Children's summer programs | \$8,000
- Bigfork Soccer Club - Program equipment | \$6,000
- CF-WF High School Swim Teams - Youth swimming | \$6,000
- City of Whitefish Parks and Recreation - Summer camp scholarships | \$8,000
- Code Girls United - Learning space remodel | \$7,500
- Conrad Mansion Museum - Garden maintenance | \$5,000
- Creative Arts Council - Facility director position | \$5,000
- Evergreen School District - Evergreen Fitness Team | \$7,500
- Farming for Future Academy - Camps for kids with disabilities | \$5,000
- FAST Blackfeet - Growing Health Program | \$7,500
- Flathead Community Health Center - Equipment for clinics | \$4,634
- Flathead County Search and Rescue Association - Field radios | \$9,831
- Flathead Land Trust - Bigfork Rec Connect Action Plan | \$6,000
- Flathead Rivers Alliance - Leave No Trace stations | \$2,086
- Flathead Shelter Friends - Marketing campaign | \$4,000
- Flathead Valley Ski Education Foundation - USSA-approved timing system | \$6,000
- Gateway to Glacier Trails - Signage, bike repair stations, and racks | \$7,500
- Glacier Nordic Club - Storage trailer | \$7,500
- Housing Whitefish - Conceptual design of affordable housing project | \$10,000
- Montana Wild Wings Recovery Center - Educational programs | \$6,000
- My Glacier Village - Services for seniors living at home | \$5,000
- North Valley Food Bank - Food distribution truck | \$10,000
- Northwest Montana Community Land Trust - Land for affordable housing | \$10,000
- Postpartum Resource Group - Peer group director position | \$7,500
- Project Whitefish Kids - Lawn mower for Smith Fields Sports Complex | \$10,000
- Rombi Wrestling Foundation - Youth wrestling program | \$6,000
- Stumptown Art Studio - New kiln | \$5,000
- The Wave - Youth swim lessons | \$6,000
- The University of Montana Foundation/Flathead Lake Biological Station - Monitoring | \$5,000
- Whitefish Community Center - Registration system upgrade | \$5,000
- Whitefish Community School - Creative pre-school programming | \$8,000
- Whitefish Firefighters Association - Equipment and tools | \$5,150
- Whitefish Freestyle - Youth scholarships | \$5,000
- Whitefish High School Baseball - Youth baseball | \$6,000
- Whitefish Lake Institute - Scholarships for 2023 Lakes Conference | \$2,500
- Whitefish Legacy Partners - Tool and volunteer hub | \$7,500
- Whitefish Safe Grad Night - All-night event for Class of 2023 | \$3,000
- Whitefish School District #44 - Stage curtains for Performing Arts Center | \$10,000
- Writing Coaches of Montana - Coaching for public school students | \$6,000



Whitefish Safe Grad Night



Abbie Shelter



FAST Blackfeet



Conrad Mansion Museum

## MAJOR COMMUNITY PROJECT GRANTS

Made possible by the Circle of Giving, the Major Community Project Grant Program is dedicated to helping nonprofit organizations complete capital projects that will have a significant and positive effect on communities in the Flathead Valley. Since inception of the program in 2010, Whitefish Community Foundation has awarded 30 Major Community Project Grants.

**\$120,000**

AWARDED IN 2023

**\$854,000**

AWARDED FROM 2010-2023

### 2023 MAJOR COMMUNITY PROJECT GRANTS

#### \$50,000 AWARDED TO THE GLACIER INSTITUTE

To support the restoration of the historic buildings at the Big Creek Outdoor Education Center, located 20 miles north of Columbia Falls. The Glacier Institute is the official education partner of Glacier National Park and Flathead National Forest, serving local youth, adults, and families with courses and camps that foster connection with the natural world. More than 30,000 children and teens have participated in the Glacier Institute's outdoor education programs at Big Creek since 1983. Restoration efforts will help preserve the center for generations to come while retaining Big Creek's rustic, historic nature.



#### \$20,000 AWARDED TO WHITEFISH SKATEPARK ASSOCIATION

To support the expansion of the Dave Olseth Memorial Skatepark to include terrain for beginner and novice skateboarders and help disperse the growing number of park users. Whitefish Skatepark Association was created in 2022 by a group of local skateboarding enthusiasts who saw the need to expand the existing park for safety purposes. The organization received permission from the City of Whitefish to expand the park by 7,000 square feet and build a beginner area and street plaza. The addition of the new areas relieves congestion in the advanced areas and helps promote safe usage of the park.

#### \$50,000 AWARDED TO FLATHEAD AUDUBON SOCIETY

To support the conservation of the 442-acre Owen Sowerwine natural area, a section of State of Montana school trust land east of Kalispell. Designated by Montana Audubon as an Important Bird Area, the land includes parts of the braided section of the Flathead and Stillwater rivers, wetlands, open grassy areas, wildlife habitat, and a wide array of native plants and birds. In collaboration with Flathead Land Trust and other partnering organizations, Flathead Audubon Society raised the funds to purchase a conservation easement from the Department of Natural Resources and Conservation to ensure the area's wildlife habitat stays intact while allowing for continued public access.

### MICRO GRANT PROGRAM

Whitefish Community Foundation's Micro Grant Program was designed to provide a low-barrier path for small and recently established nonprofits to apply for up to \$1,000 in funding. For many small nonprofits, receiving a Micro Grant is the first step in developing a relationship with the Foundation. In 2023, these five Flathead Valley nonprofits received a \$1,000 Micro Grant:

- Columbia Falls High School Speech and Debate Team
- The LOT Project
- Summit Independent Living
- Authors of the Flathead
- Whitefish School District Middle School Football

### EMERGENCY RESPONSE GRANT PROGRAM

Whitefish Community Foundation's Emergency Response Grant Program provides flexible resources for nonprofits facing an unexpected emergency. These grants may be deployed rapidly to support nonprofits during a recognized emergency or disaster in the Flathead Valley, or they may be utilized to fund projects or repairs that must be addressed immediately in order to keep a local nonprofit operating. In 2023, the Foundation awarded a \$10,000 Emergency Response Grant to North Valley Food Bank when the organization's refrigerated truck needed costly repairs.





through

OPPORTUNITY



2023  
KIDS FUND  
GRANTS

\$125,000  
KIDS FUND GRANTS  
IN 2023

\$391,000  
KIDS FUND GRANTS  
FROM 2020-2023

## KIDS FUND GIVING VOICE TO CHILDREN

Early in 2020, Whitefish philanthropists Sherry and Dave Lesar issued a challenge from the Lesar Family Foundation to raise funding to support impactful programs for Flathead Valley children who are homeless or at risk of becoming homeless. In response, Whitefish Community Foundation created the Kids Fund to support programs in the areas of housing, health and mental wellness, safety, food access, and education that mitigate the challenges faced by these youth and their families.

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

To provide afterschool programming to more than 100 K-8 students from Helena Flats School, East Evergreen Elementary, Evergreen Junior High, and the Flathead Crossroads Program.

### \$45,000 AWARDED TO CENTER FOR RESTORATIVE YOUTH JUSTICE

To support a new, full-time Youth Program Director & School Liaison to work within the Kalispell School District, offering teens meaningful accountability opportunities outside of the juvenile justice system.

### \$30,000 TO NATE CHUTE FOUNDATION

To empower a peer-to-peer mental health support consortium of high school students, and expand middle school classroom mental wellness and suicide prevention programs throughout the Flathead Valley.



KIDS FUND  
IMPACT

Since 1997, **FLATHEAD YOUTH HOME** has served local youth in need of a safe and stable place to live. Nearly all of the children and teens who enter the home face significant challenges stemming from trauma, and most have been removed from their homes due to abuse, neglect, or substance abuse problems.

In 2022, the Kids Fund awarded a three-year grant totaling \$90,000 to Flathead Youth Home to hire a Youth Advocate. The Youth Advocate works directly with every resident to set goals, establish a network of support, and follow them for up to six months after they leave the home. The first year of the program was fully funded by the Kids Fund. The Youth Advocate position has become a sustainable program, providing billable services covered by Medicaid. The Youth Advocate is an invaluable resource for the staff, and is integral to setting each resident up for success as they age out of foster care and approach adulthood.



through

EDUCATION



11

LEARNING OPPORTUNITIES IN 2023

102

NONPROFITS ATTENDED IN 2023

185

PARTICIPANTS IN 2023



# NONPROFIT DEVELOPMENT PROGRAM

Whitefish Community Foundation offers free professional development, capacity building, and networking opportunities for nonprofit staff and board members through the Nonprofit Development Program (NpDP). Over the years, NpDP has helped many Flathead Valley organizations improve oversight, transparency, fiscal responsibility, and other key areas of nonprofit governance and management.

## 2023 NONPROFIT WORKSHOPS

- Creating a Stewardship Culture
- Accepting Gifts of Securities
- Crafting a Successful Outreach Campaign
- Grow Your Gifts
- What To Do Now for Year-end Giving
- LEARN - Suicide Prevention Training
- Telling Your Impact Story to Donors

Whitefish Community Foundation is grateful to the Dennis & Phyllis Washington Foundation, the Tamarack Foundation, and contributors to the NpDP Permanent Endowment Fund for supporting this important program.



**GATEWAY TO GLACIER TRAILS** is a great example of a local nonprofit that has benefited from taking advantage of all that NpDP offers. Since 2020, the organization's Board of Directors and lone staff member have regularly engaged with NpDP's monthly workshops and newsletters, accessing valuable information and resources in the process. In 2023, Whitefish Community Foundation awarded a \$1,500 NpDP Technology Capacity Building grant to six nonprofits, including Gateway to Glacier Trails to help them strategically build their fundraising capacity through implementation of donor database software.



through

SUSTAINABILITY

## NONPROFIT ENDOWMENTS HELD BY WCF

\$18M

TOTAL ENDOWMENT ASSETS

\$400,798

DISTRIBUTIONS TO NONPROFITS IN 2023

\$3.5M

DISTRIBUTIONS TO NONPROFITS SINCE 2014

# BUILDING ENDOWMENTS FOR NONPROFIT SUSTAINABILITY

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

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



**GLACIER SYMPHONY, ORCHESTRA & CHORALE** has been a cultural beacon in the Flathead Valley since 1982, providing musicians, audiences, and students with musical experiences that inspire and educate. In 2009, Glacier Symphony, Orchestra & Chorale established a permanent endowment fund at Whitefish Community Foundation with a modest initial donation of just over \$7,000. Over the past 15 years, between fundraising and investing, their fund has grown to \$150,000 while also providing annual distributions totaling over \$44,000 to help support their programs and operations.

through

SUSTAINABILITY

97

METC GIFTS

RECEIVED SINCE 2012

\$680,927

TAX CREDIT GIFTS

RECEIVED IN 2023

## MONTANA ENDOWMENT TAX CREDIT

The **MONTANA ENDOWMENT TAX CREDIT (METC)** helps build nonprofit endowment funds by allowing donors to pay less in Montana state income taxes when they make a planned gift to a qualified Montana charitable endowment, such as any of the 43 endowment funds held at Whitefish Community Foundation.

In 2023, 17 donors saved approximately \$270,000 in Montana state income taxes by investing \$680,000 in nonprofit endowment funds held by Whitefish Community Foundation. Since inception in 2012, a total of \$3.2M has been raised for nonprofit endowments through the METC program at WCF.

	FOR INDIVIDUALS	FOR BUSINESSES
<b>TYPE OF GIFT</b>	Planned Gift (Deferred Gift Annuity) of cash or appreciated securities. <i>Minimum gift size \$5,000.</i>	Direct gift of cash or appreciated securities. <i>No minimum gift size.</i>
<b>AMOUNT OF MONTANA ENDOWMENT TAX CREDIT</b>	40% of the initial gift, up to max credit of \$15,000 per taxpayer (\$30,000 for joint filers). <i>The remaining gift amount provides a federal tax deduction.</i>	20% of gift amount, up to max credit of \$15,000. <i>The remaining gift amount provides a federal tax deduction.</i>



**Richard & Suzanne Hildner**

METC Donors, Circle of Giving Members, Donor Advised Fund Holders

Richard and Suzanne Hildner's combined history of community involvement in the Flathead Valley is astonishing. From practicing medicine to teaching high school students, the Hildners have devoted their lives to helping others. Suzanne began practicing medicine in Whitefish in 1994 and helped form Glacier Medical Associates. She served on the North Valley Hospital Board of Directors for 13 years and was one of the first physicians to volunteer at Shepherd's Hand. Richard worked for the U.S. Forest Service for many years in fire management. Later in his career, he taught government and history at Flathead and Glacier high schools and served two terms on the Whitefish City Council, including a stint as deputy mayor. Now retired, Richard and Suzanne devote much of their time to serving on nonprofit boards and committees.

In addition to volunteering their time and expertise, the Hildners also support their favorite nonprofits financially. Richard and Suzanne are big fans of the Montana Endowment Tax Credit, which allows them to support nonprofits in perpetuity while earning a credit on their Montana income taxes.

*"It's almost too good to be true," Suzanne said. "The dollars we give grow in value and impact, and we also receive a tax credit. It's a useful tool that has a tremendous ripple effect."*

The Montana Endowment Tax Credit allows donors to pay less in Montana state income taxes when they make a planned gift to a qualified Montana endowment, including any of the 43 nonprofit endowment funds held by Whitefish Community Foundation. An endowment fund helps ensure the long-term sustainability of an organization by providing a reliable source of revenue for programs and operations.

*"These tax credit gifts really put your money to work," Richard said.*

The Hildners' charitable giving strategy also includes participating in the Circle of Giving and making grants from their Donor Advised Fund held at Whitefish Community Foundation.

*"We are part of the Flathead Valley, and it's part of us," Richard said. "We shop locally, and we also invest in our community locally at Whitefish Community Foundation."*

through

LEGACIES



THANK YOU,  
LEGACY SOCIETY  
MEMBERS

## LEGACY SOCIETY

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

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

- Anonymous (5)
- Carol and Richard Atkinson
- Julie and Summerfield Baldrige
- Mary Van Buskirk and Roger Barber
- Dorothy and Luther Campbell
- Jane Kollmeyer and Terry Chute
- Lynnette and Mark Donaldson
- 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 Jensen
- 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
- Lisa and Jim Stack
- Sharon Stevens
- 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.



## TYPES OF FUNDS AT WHITEFISH COMMUNITY FOUNDATION

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



### ENDOWMENT FUNDS

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



### DESIGNATED FUNDS

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



### DONOR ADVISED FUNDS

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



### AGENCY FUNDS

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



### SCHOLARSHIP FUNDS

Are established by a company or individual to invest in the next generation through post-secondary education assistance.

## 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.

TOGETHER WE GROW

through

GIVING

# DONOR ADVISED FUNDS

## WHAT IS A DONOR ADVISED FUND?

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

## HOW DOES A DONOR ADVISED FUND WORK?



### GIVE

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



### GROW

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



### GRANT

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

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

Supporting your favorite nonprofits is quick and easy through Whitefish Community Foundation's online portal, where you can research charities, recommend grants, view your granting history, and download monthly statements. Whitefish Community Foundation offers personalized training on how to use the portal and is available to share our expertise on local nonprofit needs so you can maximize the impact of your giving. Our fees match or beat corporate DAF's and best of all, they stay local and directly support our mission.

**\$37.5M**

AWARDED THROUGH DONOR ADVISED FUND PROGRAM SINCE 2000

**\$4.5M**

AWARDED IN 2023

**66**

DONOR ADVISED FUNDS IN 2023



## AGL Foundation

Donor Advised Fund Holders, Circle of Giving Members

From the humble beginnings of the ML Gordon Sash and Door Company in 1947 to the worldwide success of its subsidiary company Cardinal Insulated Glass Co., the AGL Foundation was built on hard work, innovative ideas, and a desire to help others.

Adelyn Gordon Luther initially started the AGL Foundation to fund medical research at the Mayo Clinic in memory of her husband. After Adelyn's passing in 2010, her children and grandchildren assumed management of the foundation and expanded its funding priorities to also include conservation, education, and animal welfare.

With roots in the Flathead Valley, the AGL Foundation opened a Donor Advised Fund (DAF) at Whitefish Community Foundation in 2012. Adelyn's granddaughter Monica Pastor is among the new generation of philanthropic leaders in the Gordon family who serve as fund advisors for the AGL Foundation's DAF. Raised in Bigfork and now a small business owner in Whitefish, Monica is deeply invested in the success of local nonprofits. "The things that make this place special and give us our cultural identity are almost all nonprofit-driven," Monica said. "Having a DAF at Whitefish Community Foundation allows our private foundation to satisfy IRS distribution requirements and, more importantly, allows our family to invest in our local community."

Whitefish Community Foundation makes granting easy for DAF holders and vets nonprofits to ensure they are in good standing with the IRS. "We rely on the Community Foundation's expertise and knowledge about the local charitable climate," Monica said. "There is no better way to get access to meaningful impact and tap into a huge local knowledge base than to work with Whitefish Community Foundation."



through

EDUCATION



# SCHOLARSHIPS MAKING FUTURES BRIGHTER TOGETHER

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

### ACTIVE SCHOLARSHIP FUNDS:

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

## 10

STUDENTS RECEIVED  
SCHOLARSHIPS IN 2023

## \$15,000

AWARDED IN 2023

## THE KIITA FOUNDATION

Brooke Roberts (right) and other Kiita Foundation scholarship recipients helped build housing in Mexico as part of their international service learning experience.



**Jim and Jo-Ann Armstrong**  
**The Kiita Foundation**  
Scholarship Donors, Circle of Giving Members

Whitefish Community Foundation is pleased to partner with the Kiita Foundation to offer a life-changing opportunity for a financially independent student to earn a bachelor’s degree and join a cohort of other aspiring students who are working together to improve their communities.

Jim and Jo-Ann Armstrong started the Kiita Foundation in Phoenix, Arizona after taking their software company public 25 years ago. Since then, they have helped hundreds of students in Arizona, Colorado, and Mexico reach their highest potential by providing scholarships and service learning opportunities. As part-time residents of Whitefish since 1991, the Armstrongs have generously supported several local nonprofits over the years and were instrumental in building the Stumptown Ice Den. In 2023, the Armstrongs decided it was time to expand the Kiita Foundation’s scholarship program to include students from Whitefish.

Offered annually, the Kiita Foundation Scholarship is designed for high-achieving, financially-independent graduates of Whitefish High School or Whitefish Independent High School who plan to enroll in a four-year institution within the Montana University System. In addition to receiving up to \$10,000 per year for tuition, fees, and living expenses, the students are invited to participate in international service learning projects in Mexico with other Kiita Foundation scholarship recipients. The scholarship is renewable for up to four years and in time will help multiple Whitefish students achieve a bachelor’s degree.

Whitefish Community Foundation’s Scholarship Committee selected Class of 2023 honors student Brooke Roberts as the recipient of the first Kiita Foundation Scholarship. Brooke is a freshman at Montana State University and was able to travel to Mexico during fall semester with the Kiita Foundation and other scholarship recipients to help build housing and provide food for impoverished families.

*“My experience in Mexico opened my eyes to many valuable lessons,” Brooke said. “I feel very fortunate for the life I have and for the lives of the people I was able to help. The trip inspired me to appreciate the little things in life while encouraging others to do the same.”*

Separately, the Armstrongs joined our Circle of Giving in 2023 because they were impressed with the collective impact of the group and like supporting our entire nonprofit community with just one gift.

*“Whitefish Community Foundation clearly has a big impact on the town and surrounding areas,” Jim said. “We are glad to be a part of it, and we believe everyone who has the means should also join their efforts.”*



# CORPORATE PHILANTHROPY

## GIVING BACK TO OUR COMMUNITY

### WHITEFISH MOUNTAIN RESORT

**\$1.5M**

RAISED TO BENEFIT LOCAL NONPROFITS SINCE FUND INCEPTION IN 2002

**\$102,524**

SUPPORTED LOCAL NONPROFITS IN 2023

**\$32,474**

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

**58**

NUMBER OF GRANTS AWARDED TO LOCAL NONPROFITS IN 2023

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

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

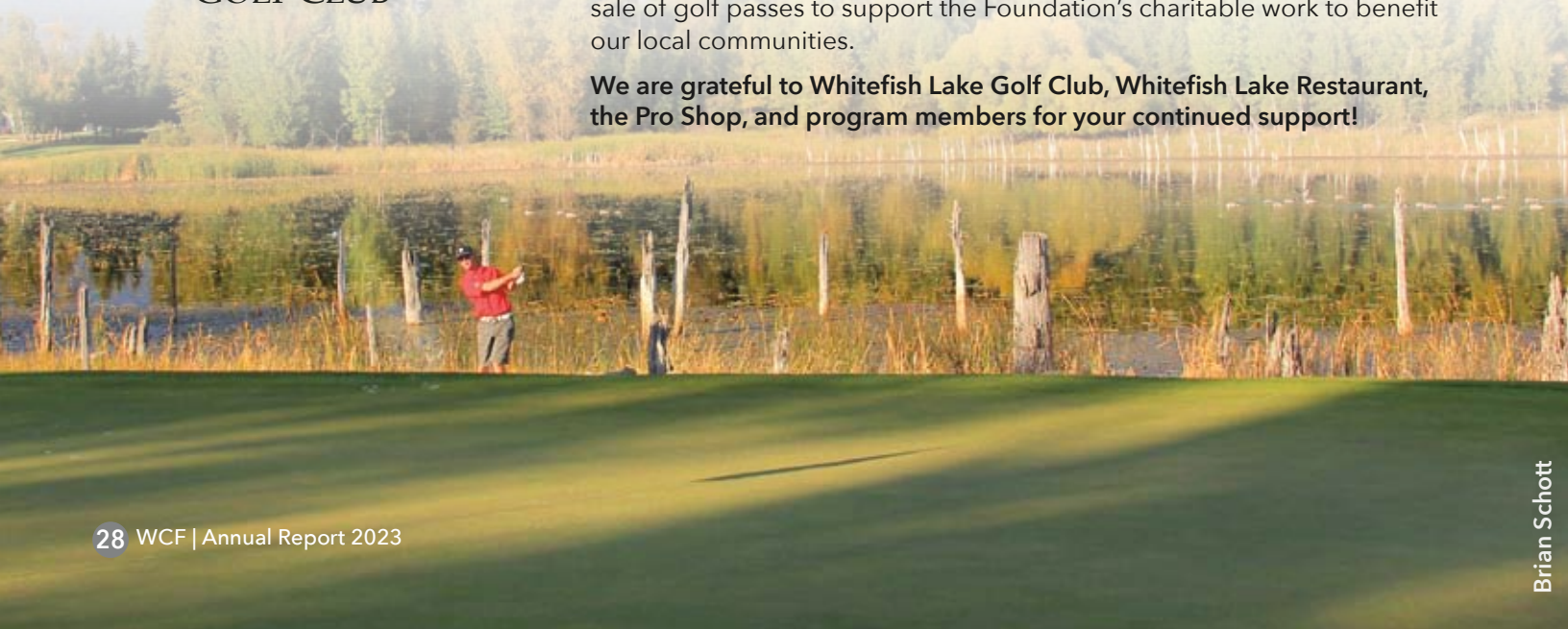


WHITEFISH LAKE GOLF CLUB

### WHITEFISH LAKE GOLF CLUB

The **PATRON GOLF PASS PROGRAM** is a charitable giving partnership between Whitefish Lake Golf Club and Whitefish Community Foundation. Since inception in 2007, the program has raised over **\$198,000** from the sale of golf passes to support the Foundation's charitable work to benefit our local communities.

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



Brian Schott

Brian Schott



# 2023

## HIGHLIGHTS

**1,967**  
NUMBER OF GRANTS AWARDED

**475**  
NUMBER OF NONPROFIT RECIPIENTS

**\$6,987**  
AVERAGE GRANT AMOUNT

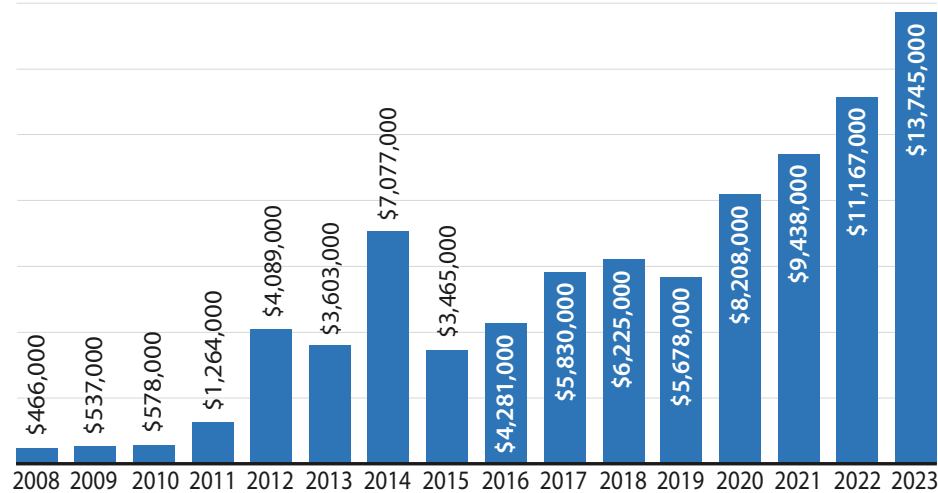
**\$28,936**  
AVERAGE PER NONPROFIT

## BY THE NUMBERS

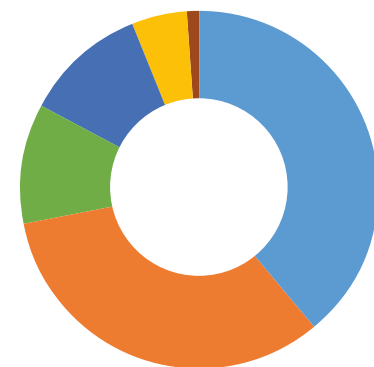
### COMPOSITION OF ASSETS 2023 YEAR END

As of December 31	2023	2022
Total Assets	\$61,445,000	\$51,424,000
Total Contributions	\$17,925,000	\$13,145,000
Total Grant Distributions	\$13,745,000	\$11,167,000

### GROWTH IN GRANTING

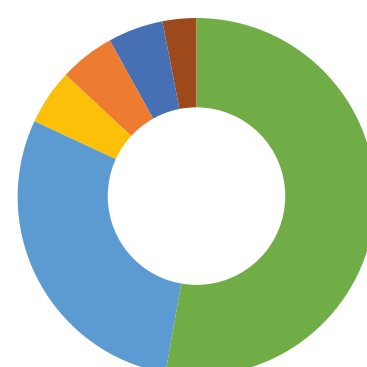


### GRANT DISTRIBUTIONS BY FUND TYPE



- Great Fish Designated Funds, 39%
- Donor Advised Funds, 33%
- WCF Grant Programs, 11%
- Designated Funds, 11%
- Endowment Funds, 5%
- Agency Funds, 1%

### TOTAL ASSETS BY FUND TYPE



- Advised, 53%
- Endowed, 29%
- Designated, 5%
- Annuity, 5%
- WCF Grants, 5%
- Operating, 3%

### INVESTMENT COMMITTEE

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

### FINANCIAL MANAGERS DISCLOSURE

Investment Manager:  
Mason Investment Advisory Services

Custodian: Pershing, LLC

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

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

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

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

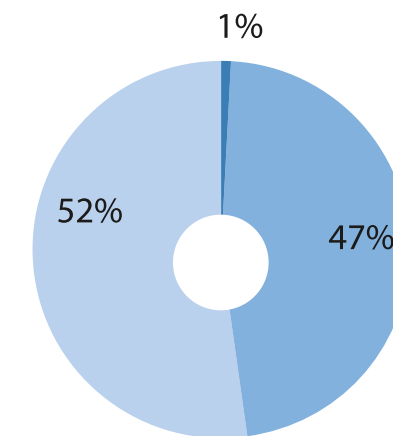
## FINANCIAL STEWARDSHIP

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

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

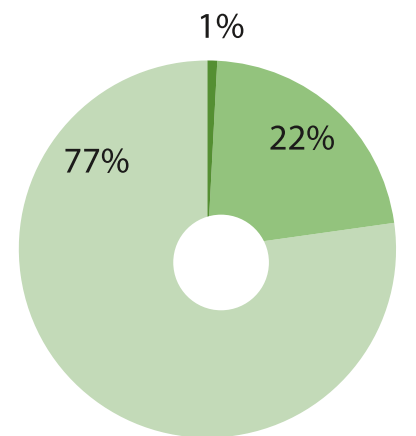
	1-YR	3-YR	5-YR
Long-Term Growth	14.80%	6.24%	9.70%
Balanced	11.36%	3.96%	7.03%
Capital Preservation	4.63%	1.90%	1.71%

### BALANCED POOL ALLOCATION



- EQUITY
- CASH
- FIXED INCOME

### LONG-TERM GROWTH ALLOCATION



- EQUITY
- CASH
- FIXED INCOME



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 (23)  
Abel, Kevin and Christine\*  
AGL Foundation\*  
Ajay Sanford, Sybil  
Akey, Lin and Kathy\*  
Akey, Rob and Kim  
Albert, Chris and Sophie  
Albrecht, Fran  
**Allen, Jeff and Teri\***  
Amalgamated Sope Company  
Anderson Family  
Andrews, Chip and Kate  
Appelgren, Brent\*  
Armstrong, Beau and Val  
Armstrong, Dave and Mary  
Armstrong, Jim and Jo-Ann (Kiita Foundation)  
Arrieta, John  
Aschim, Mary Jo  
Ashton, IV and Mary Dojnik\*  
Askevold, Gerald  
Askew, Turner and Nan  
**Atkinson, Richard and Carol\***  
Babiak, Tim and Linda  
Backslope Brewing  
Bailey, Anna Marie  
Bailey, Bob and Lisa  
Bailey, Jim  
Baillie, Ronald  
**Baldrige, Summerfield and Julie\***  
Ball, Kirk  
Ballard, Phillip and Ledjie  
Baltzell, Dean and Sharon\*  
Bannigan, Tom and Louise  
**Barasch, Stephen and Charlene\***  
Barber, Roger and Mary VanBuskirk\*  
Barham, Michael and Kristi  
Barker, Rod and Marianne\*  
Bartoskewitz, Rick and Trish  
Bax, Dale and Gayle  
**Bay, Mogens and Cindy\***  
Bayne Foundation  
**Bayne, Bill and Betsy\***  
Beale, Paul and Amy\*  
Beizer, Jon and Tierney  
Bell, Terry and Linda\*  
Bennett, Bob and Caryl\*  
Benotti, Jay  
**Big Sky IV Therapy\***  
Billuni, Richard and Bonnie  
**Bindley, Bill and Mary Ann\***  
**Bishop, Rita\***  
Blackaby, Dean

# THANK YOU, 2023 DONORS!

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

Blair, Ed and Kelly Ingham  
Bloom, Todd and Lannette  
BNSF Railway Foundation\*  
Boatwright, Carlene  
Boerner, Albertcuz  
Bonet, Don  
Bontrager, Laura  
Boody, Bruce  
Boorman, Barbara  
Bough, Loren and Jill  
**Boyce, Dick and Sandy\***  
Bradshaw, John and Cindy  
Braig, Robert and Samantha  
Briester, Matt and Tara\*  
Broussard Charitable Foundation\*  
Brown, Andrew and Janis Taylor  
Brown, Bob and Sue  
**Brown, Rockwood\***  
Budín, Ethan and Karen  
Bulkley, Brad and Ann  
Buls, Krista  
Burfield, Diana  
Burnham, Mark and Cheryl  
Burns, Catriona  
Burris, Todd and Lindsey  
Burton, Paul\*  
Cafe Mule Coffee  
**Campbell, Eileen Bocci\***  
**Campbell, Luther and Dorothy\***  
Carloss, Pat and Missy  
Carlson, Marcus and Jeanne  
Carlson, Tom and Kris  
**Case, James and Janice\***  
Case, John and Patricia  
**Casey, Maureen\***  
**Casteel, Bob and Patsy\***  
Castor, Rich  
**Chaney, John\***  
Chrest Foundation  
Church of the Cross  
**Chute, Terry and Jane Kollmeyer\***  
Clark, Brian and Marie  
Cloutier, Jenny\*  
Coburn, Braydon and Nadine  
Coggins, Eleanor  
Coghlan, Alicia  
Cohen, Connie  
Colby, Michael and Dyan  
Coleman, Stewart and Liz  
Coles, Jim and C.K.\*  
Collier, Cary and Kim  
**Collins, John and Anne\***  
Columbia Construction  
Conrad, Paul and Ellie Johnson  
Coolidge, Daniel and Joanne  
Coolidge, Del and Linda  
**Cornutt, Linda\***  
Corson, Tim and Deidre\*  
Covey, Mike and Stacy  
**Coyne, Wendy\***  
Cozad, Karl and Kathy  
Craven, Murray and Sheri  
**Creech, Kay\***

Crismon, Christopher  
Crocker, Dow and Felice\*  
**Cross, Gordon and Katherine\***  
Cubberley, Lindy\*  
Curtis, Katherine\*  
DadSki  
Daily Inter Lake  
Dakin, Bill and Sarah  
Dale, Larry and Beverly  
Danczyk, Gary and Annell\*  
Daniher, J.D. and Nicci  
Davis, Alan and Frances  
DeBartolo, Eddie and Candy\*  
Decker, Gary and Jane  
Dennis & Phyllis Washington Foundation\*  
Dexter, Amy  
Dicker, Sharon  
**Dittman, David and Frances\***  
Donaldson, Mark and Lynnette\*  
**Doney, Michael and Jennifer\***  
Dores, Michael and Jordonna  
Doyle, Michael and Myra  
DPN Farms Inc  
DuBrock, Margaret  
Dunlop, Blake and Nora  
Dworman, Ross and Kate  
Dykstra, Ben and Lynn\*  
Eckstrom, Andrew and Jennie  
Ellingson, Brittan and Lauren  
Ennis, Bruce and Margaret Davis  
Ennis, Felicia  
Erfle, John and Linda  
Erickson, Bart and Carole  
Erickson, Leif and Aubrey  
Ericson, Dave and Sarah\*  
Esch, Tom and Charlene  
Fagg, Russ and Karen  
First Interstate BancSystem Foundation\*  
**First Interstate Bank\***  
Flathead Electric Cooperative  
Flint, Fred and Nancy  
Flowerscapes LLC  
Foley, Patrick and Margaret Askew  
Fraser, Michael and Kate  
Friedman, Marshall and Kathy  
Fuller, Putt and Kirsten  
**Gallagher, Barbara\***  
Garbacz, James and Laura\*  
Garrison, Greg and Kathy\*  
Gentry, Janelle  
Gerber, Scott and Tracey  
Gersh, Bob and Kay\*  
Gill, Geoffrey  
Gilman, Beverly  
Gist, Steve and Ginny  
**Glacier Bank\***  
**Glacier Jet Center\***  
Gleason, Caron Lee  
Goldberg, Adele  
Good, Wanda\*  
Gordon, David  
Gordon, Miles and Jan  
**Gordon, Richard and Cheryl Watkins\***

**Grady, Dave and Linda Engh-Grady\***  
Granmo, Cindy\*  
Grant, Peter and Colleen\*  
Grateful Iris Glass  
**Graves, John and Sarah\***  
**Gray, Sandy and Cameron Blake\***  
Great Northern Bar\*  
Greater Than Image, LLC  
Green, Ken and Jeanine  
Greenup, Taylor  
**Gregory, Joe and Cindy\***  
Groschupf, James and Irene  
Groshong, Jud and Lee Ann  
**Grove, Larry and Dianne\***  
Grube, Brian and Georgia  
Gwaltney, Christopher and Jill\*  
Hackathorn, Casey and Tina Barrett  
Hackett, Molly  
Hadidi, Cyrus and Michelle  
Hagale, John and Jes\*  
Hagg, John and Kristin  
Haivala, Jake and Sam  
Hall-Halliburton Foundation  
Hammer Nutrition  
Hanna, William and Phylis  
Hanson, Jason and Stefanie  
**Harding, Tom and Sue\***  
Harman, Fred and Stephanie\*  
Harris Financial Services  
Harris, Evan and Sadie  
Harris, Jacque and Willo  
Harrison, Gil and Ruth\*  
Harrod, Gary and Margo  
Harry, Scott and Ellis  
Hawxhurst, Scott and Melissa Sladek  
**Haycox, Brian and Shannon\***  
Hayes, Bob and Kelly  
**Hayes, Bob and Patty\***  
Heinrich, Klaus and Joaquenia\*  
Heinzig, Dennis and Iona McMillan  
Henderson, Grant and Jill\*  
Hermes, Bob and Carol  
Hess, Peter and Cynthia  
Hickok, Doug and Lisa  
Hidden Moose Lodge  
**Hildner, Richard and Suzanne\***  
Hines, Roderick and Doris  
**Hobbs, Russ and Linda\***  
Hollensteiner, Jim  
Hollo, Tom and Dorothy Drury  
Holloway, Matt and Corrie  
Hosek, Dusty\*  
Howard, Steve and Jodi\*  
Howard, Trevor and Kacy  
Hunt, Will and Leslie  
Hyer, Jeff  
**Ila B. Dousman Fund\***  
**Iron Horse Foundation\***  
Iron Horse Golf Club\*  
Iverson, Carley  
Jackson, Marcie  
Jacobs, Margo  
Jacobsen, David and Janice\*  
James A. Reep Family Foundation\*  
Janni, Scott and Barb  
Jarrendt, Ralph and Linda\*  
**JCCS CPAs\***  
Jensen, Jeff and Lou Anne  
**Jenson, Mike and Barbara\***  
**Jeremiassen, Paul and Ann\***  
Johannsen, JD

Johannsen, Teddi  
Johannsen, Tracy  
Johnson, Gordon  
Johnson, Judy  
Johnson, Paul  
**Jones, Bill and Ann\***  
Jones, Jonny and Brenda  
Jones, Mark and Robyn  
Jones, Richard and Mary Siloti  
Jungerman, Mark and Molly Miller\*  
Kahle, Bill and Sharon  
Kaptanian, Pierre and Melissa  
Kartsonis, Mike and Melinda  
Kelly, Steven and Melissa  
Kelsall, Jill  
**Kelton, Rachel\***  
KGEZ AM 600 & FM 96.5  
King, John and Maureen\*  
Kinonen, Rick and Sybil  
Kirk, Philip and Lesia\*  
Kniveton, Burket and Claire  
Knox, Steve  
Kola, Joe and Tracy  
Kraft, Rich and Catherine\*  
**Kramer, John and Jon McBride\***  
Kulzer, Ross and Miranda  
Kuntz, Jon and Jesse  
Kushniruk, Marshal and Julie Williams  
Lacey, John and Dana  
LaChance, Tom and Cindy  
Lamb, Paul and Yvonne\*  
Lane, Thomas and Ann  
Larence, Frank and Ginny\*  
LaRocca, Lindsey  
**Latimer, Jay and Mignon\***  
Latimer, Nan  
Lauman, Michael and Wendy  
Leftwich, Frank and Gerry\*  
Leiser, Pat  
Leistiko, Fred and Connie  
**Lesar, Dave and Sherry\***  
Levitt, Stuart and Nina  
Lewensohn, Len and Carol  
Lightbody, Carol  
Lillard, Sydney and Karen Perser  
Litchfield, Marcia  
Littleton, David and Susan Stevenson  
Lojeski, Ed and Maureen Bolton  
Longhart, Fred and Marjory McClaren  
Lowe, Robert and Debbie  
Lozman, Josh and Kristen Sramek  
Lucke, Kathy  
Luedke, Bret and Ruth  
Lufkin, Kate  
Lundgren, Nancy  
Luoma, Dick and Kay  
Lutes, Duncan and Deb  
MacLaren, Scotty and Gayle\*  
**Maetzold, Charlie and Linda\***  
Magnuson, Rick and Allison\*  
Malinak, Dennis and Anne  
Malone, Edward and Delonna  
Malone, Janet  
Marlowe, Jack and Suzanne  
Martin, John and Sarabeth  
Martinez, Larry and Anne  
Mason, Chuck  
**Mayo, Jan\***  
McCabe, Murray and Libby\*  
McCann, Paul and Janice\*  
**McCarty, Charles and Annie Lent\***

McClure, Tom and Christina  
McCoy, Abe and Shelley  
McCraw, Adam  
McGarvey, Allan and Valeri  
McIntyre, Curt and Sherry  
McKinney, Jono  
Meade, Jessica  
**Mechem, Jim and JeanAnne Swope\***  
Medler, James  
Mehl, Marty and Mary Jo  
Meislik, Jerry and Rhona\*  
Menter, Larry and Ruth  
Mihelish, Bruce and Pam  
Miles, Mary Anne  
**Milisci, Abbie\***  
Miller, Brian and Heidi  
Miller, Jody and Katie  
**Miller, Lori\***  
Miller, Necile  
**Miller, Ron and Jean\***  
Minchew, Randy and Teresa  
Montalban, Patrick  
Montana Coffee Traders  
Montanye, David and Emmy  
Monzingo, Betty  
Moody, Karl and Carol\*  
Moore, Ernie and Maureen Cleary  
Moran, Matt and Ellen\*  
Moran, Thomas and Nancy\*  
Morris, Barbara\*  
Morton, Ted  
Moss, Christine  
Nelson, Brandon  
Nelson, Douglas and Barbara\*  
**Nelson, Leif and Gloria\***  
Nelson, Rick and Marilyn  
Newton, Doug and Amy Johannes  
Nichols, Steven and Elda  
Nicolson, Grahame and Karen  
Niese, Kristine  
Nitopi, Tom and Terrie  
Northwest Imaging\*  
nuWest Builders  
**O'Brien, Kevin and Leslie\***  
Ojala, Laura  
Oleson, Doug and Beverly\*  
O'Neil, Marcia\*  
Onstead, Randall and Pam  
**Origitano, TC and Claudine\***  
Paone, William and Robin  
Park Side Credit Union\*  
Parsons, Larry and Val  
Penfield, Annie  
Perl, Dan and Sandy  
Pero, Robert and Janen  
Pickens, Bill and Lisette  
Pickert, Ross and Coco  
Plett, Katie  
Powers, Mary Drew  
Puffer, Blanche  
**Quinn Family\***  
Quintia, Erin  
Ramlow, Hugh\*  
**Reed, Doug and Nikki\***  
Reed, Rick and Melinda  
Reggie's Quick Lube\*  
Reich, Tori  
Reid, Louisa  
Reisch, Danelle  
Rennie, Heather  
Ricklefs, Hank and Sue\*

# THANK YOU, 2023 DONORS!

Risen Christ Catholic Church\*  
**Rosenberg, Ron and Karen\***  
 Rowntree, Walter and Laura Reynolds  
 Rudnicki, Stacy  
 Ruhana, George and Kim  
 Russell, Michael and Sally Cameron-Russell  
 Rygg, Char\*  
 Sanderude, Scott and Julie\*  
 Santa, John and Carol  
 Satterlee, Alan and Elspeth\*  
 Schlinger, Stacy\*  
 Schmidt, Eric and Deven Robinson  
 Schmidt, Mark\*  
 Scholten, Kevin and Liz  
 Schott, Brian and Lyndsay  
 Schram, Gary  
 Schuber, Charles and Nancy  
 Schulte, Greg and Barb  
 Schwartzenberger, Kevin and Kelli  
 Scott, Toby  
 Seibert, Tyler and Jennifer  
 Seigmund, Peter and Jill  
 Sevier, Tamera  
 Shaw, Mike and Marie\*  
 Shaw, Tim and Hilary\*  
 Shaw, Van and Marla  
**Shennan, Jamie and Janna\***  
 Shennan, Melissa  
 Short, Dan and Kim  
 Siebenaler, William  
 Sievers, Roger  
 Silverman, Paul and Connie\*  
 Simmons, Bill and Kathy  
 Siomos, Vassilis and Austine  
 Sippel, Carol  
 Siu, Albert and Randi  
 Sliter, Everit and Nikki  
 Smalley, Jerry and Nan  
 Smith, Dan and Christina  
 Smith, Dana  
 Smith, G. Stacy and Ashley  
 Smith, Josh and Judy\*  
 Smith, Kevin and Jill  
 Smith, Linda  
 Smith, Lucy  
 Smith, Mark and Jenny  
 Smith, Samuel and Claudia  
 Smith, Will and Bonnie\*  
 Smith, William and Martha  
 Snyder, Debbie  
 Snyder, Elaine  
 Soutavong, Brian  
**Spragg, Roger and Carole\***  
 Spring, Jason and Angie St. Onge  
 Stack, Jim and Lisa  
 Stanley, Christine  
 Steen, Ray  
 Stein, Gus and Jen\*  
 Stevens, Rob and Margy  
 Stevens, Sharon  
 Stewart, Alison  
 Stimpson, Kim and Kelly\*  
 Stinson, Alan and Lisa  
 Stockman Bank  
 Stokes, David and Nancy\*  
 Straka, Sara\*  
 Summers, Kristi

Summit Beverage  
 Svennungsen, Rock and Joanie  
 Tailwinds Charitable Foundation  
 Tallman, Jeanne  
 Tamarack Foundation\*  
 Tamble, Brooke  
**Tannehill, Bruce and Gail Cleveland\***  
 Taylor, Kent and Kim\*  
 Taylor, Loren  
 Taylor, Travis and Jordan\*  
 Teal, Roy and Debbie  
 Temple, Chris and Meg  
 Thomas, Genevieve  
 Thompson, Jesse and Nancy  
 Thompson, Steve and Nancy Woodruff  
 Tickle, Sam and Julie  
**Tinkler, Edie\***  
 Tomkiel, Brian and Monica Molina  
 Top Copy Printing  
 Tracy Foundation (Peter and Sherry Tracy)  
**Trundle, John and Sylvia\***  
 Tucker, Scott and Heather  
 Turner, Garrett and Priscilla  
 Turner, James and Toni  
 Twete, Brenda  
 Tyler, Jack and Morgan  
 Underscore Art Gallery  
 Usibelli, Mitchel and Michele  
 VanDenburgh, John and Kristen  
 Vera Jean Heckathorn Estate  
 Viens, Andy and Linda\*  
 Villalpando, Amy  
**Voyles, Robb and Lori\***  
 Walecka, John and Ali  
 Waller, Rob and Julie  
**Walton, Bill and Dori\***  
 Ward, Ben and Katie\*  
 Warning, Mike and Leslie\*  
**Warrick, Alan and Boots\***  
 Watson, Jim and Carol Bibler\*  
 Weiss, Noam and Sophia  
 Welch, Anita  
 Wesen, Darcel  
**Wessels, Ken and Byrdie\***  
 Westermark, Mary Jane  
**Whisler, Steve and Ardy\***  
**Whitefish Credit Union\***  
 Wiens, Gary and Pamela  
 Williams, April Walker  
**Williams, Dave and Judy\***  
 Williams, Larry and Rebecca  
 Williams, Rick and Sue  
 Williams, Tim and Amy  
 Williamson, Hal and Mary\*  
 Wilson, Brian and Meggen  
 Wilson, John and Marjorie  
 Wilson, Steve  
**Wise, Doug and Bet\***  
**Witt, John and Susan\***  
 Wolf, Debra  
 Wolf, Trisha  
 Wollner, Dave and Sue  
 Yeoman, Thomas and Megan  
 Yerger, Wirt and Linda  
**Young, Alison\***  
**Ziegler, David\***  
**Ziegler, Jim\***

## IN-KIND DONORS:

Bigfork Eagle  
 Billy Angel  
 Bonsai Brewing Project  
 Buffalo Café  
 Daily Inter Lake  
 First Interstate Bank  
 Flathead Valley Community College  
 Flowerscapes  
 Grouse Mountain Lodge  
 Hungry Horse News  
 Iron Horse Golf Club  
 KGEZ AM 600 and FM ti6.5  
 Lori Miller Law  
 Summit Beverage  
 Trovare  
 The Homestead  
 The Wave Aquatic & Fitness Center  
 Wachholz College Center  
 Whitefish Lake Golf Club  
 Whitefish Lake Restaurant  
 Whitefish Mountain Resort  
 Whitefish Pilot  
 Whitefish Theatre Co.  
 Whitefish Westside Market

## TRIBUTES:

Richard and Carol Atkinson  
 Terry and Linda Bell  
 Harry Brown  
 Ronnie Crow  
 Wayne and Lesley Deans  
 Bill and Rusty Duvall  
 Barnes and Cammie Hauptfuhrer  
 Michael Jaffe  
 Nina Latimer  
 Murray and Elizabeth McCabe  
 Sarah Nuckolls  
 Jamie Shennan  
 Carol Bibler and Jim Watson  
 Julie Williams

\* Indicates donors who have made a charitable contribution annually for the past five to nine consecutive years.  
**Bold \*** indicates donors who have made a charitable contribution annually for the past 10 or more consecutive years.

Every effort is made to correctly list and thank each donor who allows us to make a public acknowledgement of their gifts to Whitefish Community Foundation. If your name is missing or incorrect, we apologize for our error. Please contact us with corrections at (406) 863-1781 or [contact@whitefishcommunityfoundation.org](mailto:contact@whitefishcommunityfoundation.org). Thank you.

# IN MEMORIAM

## DAVE STEWART (1939-2023)

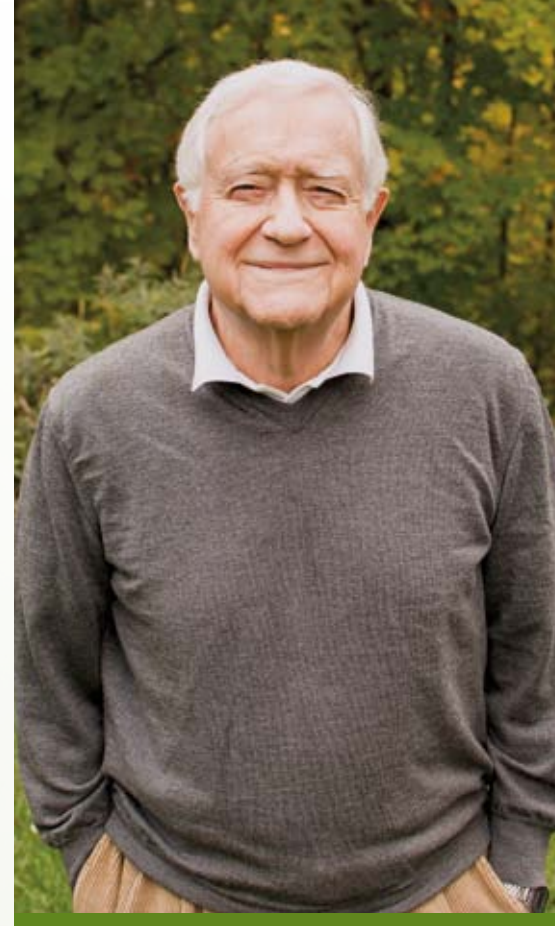
Founder, Board member 2000-2008,  
 Treasurer 2000-2002, Board President 2005-2007

## Whitefish lost a great leader and visionary with the passing of Dave Stewart in 2023.

Dave's family moved to Whitefish when he was a baby, and he lived here until he was 13 years old, eventually returning in 1989 when he retired. During his time away from Whitefish, Dave led an incredible and adventurous life. After serving in Vietnam as an interpreter, he earned an MBA and used it to establish a career in international business, which took him to countries all over the globe, including Korea, Egypt, and England. Once retired, Dave continued his world travels and enjoyed his favorite activities of hiking, golf, and tennis. He also became very involved in our community, leading the renovation of the Whitefish Depot project and serving as the chair of the organization that built the O'Shaughnessy Center and the Whitefish Community Library. It was that prominent role that connected him with the other visionary people who came up with the idea to form a community foundation in Whitefish.

As one of the original founders of Whitefish Community Foundation, Dave lent his business acumen to the organization. Serving as the first treasurer from 2000-2002 and the second president from 2005-2007, he helped formulate the mission and vision of the Foundation alongside Mike Jenson, John Kramer, Connie Heckathorn, and Roxanne Rogers. Of the group, he was the one to keep them grounded, steering their ideas toward those that could be practically executed. Dave was also instrumental in the formulation of the by-laws and the filing of all paperwork necessary for the creation of a new nonprofit. After his tenure on the Board of Directors, Dave stayed active with the Foundation, serving on the Investment Committee for many years.

Dave continues to make a difference in our community with his legacy gift. In 2005, he named Whitefish Community Foundation's Permanent Endowment Fund to receive a portion of his estate. This gift will benefit our programs and work for local nonprofits for generations to come.



## IN MEMORY OF:

Gordon Ash  
 Marilyn Brown  
 Tom Caughlan  
 David Dixon  
 Helene Doney  
 Carolyn Doney Smith  
 Eric Hosek  
 Barb Janni  
 Paul Johannsen  
 Roberta Manion  
 Darryl Moulder  
 Ben Parsons  
 Doris Schumm

# WHITEFISH COMMUNITY FOUNDATION BOARD OF DIRECTORS

LEADERSHIP

through



**Greg Garrison**  
Board Chair



**Brenden Craig**  
Treasurer



**Ardy Whisler**  
Past Board Chair  
Nom/Gov Committee Chair



**Jeff Allen**



**Carol Atkinson**  
Grants Committee Chair



**Betsy Bayne**  
Scholarship Committee Chair



**Maureen Casey**



**Gordon Cross**  
Kids Fund Committee Chair



**Laura Garbacz**



**Sherry Lesar**



**Caeli Quinn**



**Hank Ricklefs**



**G. Stacy Smith**  
Investment Committee Chair



**Lucy Smith**



**John Witt**



**Janice Case**



**John Collins**



**Linda Maetzold**



**Monica Pastor**



**Doug Reed**



**Ken Wessels**

**THANK YOU, OUTGOING BOARD MEMBERS!**

**EMERITUS BOARD EX OFFICIO:** John Collins, Dave Dittman, John Kramer, Mike Jenson, Jay Latimer, Tom Quinn, Jamie Shennan, Ken Wessels

# GIVING TOGETHER



Brian Schott

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

## OUR TEAM

**Alan Davis** *President/CEO*

**Daria Perez** *Chief Financial Officer*

**Liz Scholten** *Associate Director of Finance*

**Lynnette Donaldson** *Director of Programs and Grants*

**Jill Seigmund** *Director of Marketing and Communications*

## LEADERSHIP CIRCLE

### PAST BOARD CHAIRS:

Mike Jenson 2000–2004

Dave Stewart 2005–2007

Paul Johannsen 2008–2010

Carol B. Atkinson 2011–2013

David Dittman 2014–2016

Ken Wessels 2017–2018

Linda Maetzold 2019–2021

Ardy Whisler 2022–2023



Giving Together for the Flathead Valley

P.O. Box 1060

214 2nd Street West

Whitefish, Montana 59937

406-863-1781

contact@whitefishcommunityfoundation.org

**whitefishcommunityfoundation.org**



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.

*Front/Back Cover: Braided sections of the Flathead River east of Kalispell, including the newly protected Owen Sowerwine natural area. Photo by Gravity Shots.*

*Graphic Design: Robin Sorg, LLC*



P.O. Box 1060  
214 2nd Street West  
Whitefish, MT 59937  
[contact@whitefishcommunityfoundation.org](mailto:contact@whitefishcommunityfoundation.org)  
[whitefishcommunityfoundation.org](http://whitefishcommunityfoundation.org)

PRSRT. STD  
U.S. Postage  
**Paid**  
Permit No. 151  
Great Falls, MT