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

2017 ANNUAL REPORT

MISSION

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TABLE OF CONTENTS

Donors............................................................................................................ 4-6
From the Chair................................................................................................. 7
Circle of Giving.............................................................................................. 8-9
Community Grant Report.............................................................................. 10-11
Great Fish Community Challenge........................................................... 12-15
Special Awards.............................................................................................. 16-17
Patron Pass Programs.................................................................................... 18
Scholarship..................................................................................................... 19
Building Sustainability.................................................................................. 20-21
Investment & Financial Summary............................................................... 22
Donor Advised Funds..................................................................................... 23
Assets & Revenue.......................................................................................... 24
Legacy Society................................................................................................. 25
Donor Recognition.......................................................................................... 26-27
In Honor and In Memory................................................................................ 27
Leadership....................................................................................................... 28-29
At WHITEFISH COMMUNITY FOUNDATION, our mission is to advance giving. It is to inspire giving. Giving that will impact our community and those in need. Giving that will enrich our culture and our lives. Giving that will restore families and strengthen our community. Giving that will improve the lives of our neighbors and giving that will change things for the better. We know that when we give together, we can accomplish so much more.
Rhona and Jerry Meislik

“Avid supporters of many local charities, Rhona and Jerry Meislik enjoy giving back to the community. Living on Big Mountain, they support the Big Mountain Firefighters. Rhona served as a Trustee on the Fire Board and now is treasurer of the Big Mountain Firefighters Association. They also give to many local charities and volunteer for Glacier Symphony and Chorale. After working with Whitefish Community Foundation for several years to build endowments using the Montana Charitable Endowment Tax Credit, they decided to move their Donor Advised Fund over to the Community Foundation as well.”

—Rhona & Jerry Meislik

Doug and Nikki Reed

“Whitefish has given our family such a tremendous quality of life not only with the mountains, trails, and waters, but most of all, the people in the community. We feel that participating in the Circle is a meaningful and far-reaching way to give back.” —Doug & Nikki Reed

Doug and Nikki Reed have been active in the Whitefish community for years. Both graduates of Whitefish High School, Doug went on to University of Colorado, Boulder, and Nikki spent several years in Massachusetts, Colorado, and then University of Montana. They returned to Whitefish, later married, and went on to lead active community careers. Today, Nikki is an English teacher at Whitefish High School and Doug is the owner/operator of the Whitefish Lake Golf Club Restaurant. With busy careers and children very active in soccer, music, and ski racing, they still find time to be community volunteers and philanthropists, supporting the Whitefish Trail, North Valley Music School, and the Whitefish Community Foundation’s Circle of Giving. Doug has served eight years on the Foundation’s Board of Directors and two years as the Chair of the Community Grant Programs. Nikki spends her free time assisting with the Whitefish High School Freeflow Club, a program that encourages STEM education and career paths for both young men and women.

“We built our Big Mountain home in 1994 and moved to Whitefish permanently in 2000. We love living here and enjoy giving back to the community. Using the Whitefish Community Foundation has made our giving and tax planning much easier. The Foundation is fast, efficient, and the staff is very knowledgeable and helpful. Using the Foundation has allowed us to focus on what we enjoy doing most—being retired and taking advantage of all the area has to offer.”

—Rhona & Jerry Meislik

WHERE GIVING THRIVES

WHERE GIVING SUSTAINS

WCF | Annual Report 2017
FROM THE CHAIRMAN

“2017 WAS A VERY ACTIVE AND SUCCESSFUL YEAR FOR THE FOUNDATION.”

Many of our activities will be highlighted throughout this report so I want to focus this year on one effort, our Circle of Giving, which has become the core of the Whitefish Community Foundation’s annual giving. This group believes strongly in the benefits that are derived from supporting the charitable efforts of our community. The annual giving to the Circle of Giving allows our charities to better serve the increasing needs of our area.

The Circle of Giving is made up of a group of very generous individuals who donate substantial amounts to the Foundation annually, this year’s giving ranged from $5,000 to $40,000. This effort has become the core of our financial support for the Great Fish Community Challenge, community grant programs, our emergency grants and our major grant program. Thank you to these donors for their generous support and I would ask those who are not yet members to consider joining the Circle of Giving in 2018.

I also want to recognize our President, Linda Grady, who spearheads all that we accomplish at the Foundation. This February the Whitefish Chamber of Commerce awarded Linda the “Great Whitefish Award,” their lifetime achievement award for someone who has made outstanding contributions to the Whitefish Community. All of us are proud of what Linda has achieved for our community, congratulations Linda, well deserved.

Ken Wessels
Board Chair
2017–2018

$28.6M Combined Assets
$14.7M Donor Advised Fund Assets
$10.1M Endowed Assets
$5,846,831 Total Grants Awarded in 2017
93 Total Number of Funds held by WCF
46 Advised Funds
24 Permanent Endowment Funds

Dave and Judy Williams

“We count ourselves very lucky to be part of the Flathead Valley, with so many like-minded individuals who believe that the health of a community depends on the desire of individuals to work together for the wellbeing of the whole.”

–Dave & Judy Williams

After a serendipitous visit to Whitefish in 2000 that helped them reprioritize the direction of their lives, Dave and Judy Williams decided to make Whitefish their permanent home in 2005. Hiking, skiing, fly fishing, the Flathead Valley offers much to enjoy.

Making time to give back to the Flathead Valley community is an activity that has remained a priority for them during the last decade. Dave has been active with Habitat for Humanity for the past twelve years; in partnership with countless volunteers and dedicated Habitat staff, he and Judy have helped 38 hardworking families gain simple, decent, and affordable housing. Dave and Judy have also had the privilege to volunteer with the Whitefish Veterans Support Team, a group of Whitefish volunteers dedicated to helping injured veterans transition from military to civilian life. Additionally, they are fortunate to be able to offer the Whitefish Community Foundation financial support to benefit the many nonprofits in Flathead Valley that do such meaningful work with local individuals and families.

“We count ourselves very lucky to be part of the Flathead Valley, with so many like-minded individuals who believe that the health of a community depends on the desire of individuals to work together for the wellbeing of the whole.”

–Dave & Judy Williams

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CIRCLE OF GIVING

THE CIRCLE OF GIVING is a group of extraordinary individuals giving together to make great things happen in our community. Circle donors contribute from $5,000 to $40,000 annually to support the Foundation’s Community Grant Program and the Great Fish Community Challenge. The generosity of our Circle donors inspires increased giving during the Great Fish Community Challenge to support the tremendous work of our local nonprofits. Thank you for what you do in our community!

Anonymous (2)
AGL Foundation
Teri and Jeff Allen
Carol and Richard Atkinson
Cindy and Mogens Bay
Betsy and Bill Bayne
Dee and Jim Beightol
Tricia and Gil Brinzing
Sandy and Dick Boyce
Rockwood Brown, In Memory of Marilyn Brown
Eileen Boci Campbell
Janice and Jim Case
Jana and Mike Cashin
Karen and Nick Chickering
Anne and John Collins
Debbie and Robert Douglas
Ilka B. Doussman Fund
Barbara and Mike Gallagher
Kathy and Greg Garrison
Michael Goguen
Chris and Steve Gomo
Cheryl Watkins and Dick Gordon
Colleen and Peter Grant
Sarah and John Graves
Cindy and Joe Gregory
Jen and John Hagale
Mary Lloyd and Richard Harding
Shannen and Brian Haycox
Patty and Bob Hayes
Kristin and Greg Hetzer
Bill Howard
Iron Horse Foundation
Barbara and Mike Jenson
Ann and Paul Jeremiasen
John Kramer
Mignon and Jay Latimer
Sherry and David Lesar
Linda and Charlie Maetzold
Allison and Rick Magnuson
Maureen and Marlin McKeever
Lori Miller
Ellen and Matt Moran
Barbara Morris
Rose and Myron Noble
Teresa and Tom Quinn
Nikki and Doug Reed
Karen and Ron Rosenberg
Leanne Slighinger
Stacy Slighinger
Slighinger Family Foundation
Shirley and Mark Schmidt
Janna and Jamie Shennan
Carole and Roger Spragg
Lisa and Alan Stinson
Jill and James Stroud
Lori and Robb Voyles
Dorie and Bill Walton
Robots and Alan Warrick
Virginia Weldon and Francis Austin
Linda and Stephen Wendfeldt
Byrdie and Ken Wessels
Ardy and Steve Whisler
Judy and Dave Williams
Mary and Hal Williamson
Bet and Doug Wise
Susan and John Witt

Individuals who innately value philanthropy gave to the Circle in 2017 $586,000 Circle contributions in 2017 directly benefiting community grant programs 40% Great Fish Community Challenge Match Fund 2017 10% Major Grants Fund 15% Community Grants Fund 5% Great Fish Community Challenge Organization 30% Great Fish Community Challenge Match Fund 2018

The Great Fish Community Challenge and all of the Community Foundation’s grant programs are really making a difference in our community thanks to the Circle of Giving. Donors to the Circle intrinsically value philanthropy for what it can do to change lives for the better.

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

We encourage you to join this extraordinary group that is the backbone of the GREAT FISH COMMUNITY CHALLENGE…
COMMUNITY GRANT PROGRAM began in 2000 as a way to assist and improve local nonprofit’s ability to serve the community. Thanks to the generosity of the Circle of Giving and individual donors, Whitefish Community Foundation strategically grants over $100,000 a year through the Community Grant Program to important and even critical issues in Whitefish. Grant requests are reviewed by a committee comprised of Foundation Board members and volunteers who are all community involved.

$1.6 M .............................................. Total amount of community grants awarded since its inception in 2000

$84,165 ...................................... Awarded from the 2017 Community Grant Program

$10,350 .................................... Awarded from the Micro Grant and Emergency Grant Programs

$10,000 .................................. Awarded from the Endowment Challenge Grant Program

$1,000–$4,000 ...... Grant Amounts Awarded in the Community Grant Program

34 ............................................................ Number of Nonprofits receiving Community Grants in 2017

Casting for Recovery—Western Montana
CF-WF HS Swim Teams
Children’s House Montessori School
City of Whitefish Parks and Recreation
Civil Air Patrol Flathead Composite Squadron
Climate Smart Glacier Country
Family Forestry Expo
Farming for the Future Academy
Flathead Area Mountain Bikers
Flathead Audubon Society
Flathead Food Bank
Flathead Land Trust
Flathead Rapids
Flathead Spay & Neuter Task Force
Gateway to Glacier Trail
Montana Equestrian Events
Montana Kayak Academy
North West Montana Veterans Stand Down
Olney-Bissell School
Ravenwood Natural Science Center
Riding on Insulin
Samaritan House
Shepherd’s Hand Free Clinic
Special Olympics Montana
The Patrol Fund
WAG, Inc.—Whitefish Animal Group
Whitefish Arts Council
Whitefish Community Garden
Whitefish Community School
Whitefish Housing Authority
Whitefish Library Association
Whitefish School District #44
Whitefish Spay & Neuter Task Force
Whitefish Shines!

$417,100 Awarded since program began in 2010

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

$38,500 WHITEFISH LAKE INSTITUTE for the purchase of a decontamination station to aid in the prevention of invasive species coming into Whitefish Lake and other water sources.

$25,000 WHITEFISH SCHOOL DISTRICT for the Center for Sustainability and Entrepreneurship, a privately funded project that will provide students k-12 with hands-on projects focused on agriculture, natural resources, forestry, energy, and entrepreneurship in a net zero experiential learning center.

$10,000 TRUST FOR PUBLIC LANDS to assist with the public-private partnership to protect 7,000 acres of forestland north of Whitefish in the Stillwater Basin above Whitefish Lake. The project helps maintain productive working forests, protect wildlife habitat, and protects Whitefish’s water supply.
WHERE GIVING IMPACTS

GREAT FISH COMMUNITY CHALLENGE IMPACT

TOTAL RAISED by each nonprofit participating in the 2017 Great Fish Community Challenge including the match.

- Abbie Shelter ................................................ $48,211
- Backpack Assistance Program .................................. $60,070
- Bob Marshall Wilderness Foundation .......................... $16,630
- CASA for Kids .............................................. $70,805
- Center for Restorative Youth Justice .......................... $35,750
- CF-WHS Swim Teams ........................................ $8,826
- Child Bridge .................................................. $120,295
- DREAM Adaptive Recreation ................................... $61,759
- Farm Hands—Nourish the Flathead ............................ $56,322
- Flathead Area Mountain Bikers ................................ $13,666
- Flathead Cancer Aid Services .................................. $30,655
- Flathead Land Trust ......................................... $28,185
- Flathead Rapids ............................................ $16,648
- Flathead Shelter Friends ..................................... $54,150
- Flathead Valley Ski Education Foundation ................ $31,585
- Flathead Youth Home ......................................... $28,720
- Friends of the Flathead Avalanche Center ................ $28,520
- FVCC Foundation .......................................... $31,520
- Glacier Institute ............................................. $62,158
- Glacier National Park Conservancy ......................... $41,995
- Glacier Nordic Club ......................................... $54,337
- Glacier Symphony and Chorale ................................ $55,545
- Habitat for Humanity of Flathead Valley ................... $22,244
- Intermountain ................................................. $22,244
- Nate Chute Foundation ....................................... $30,834
- North Valley Food Bank ...................................... $30,803
- North Valley Hospital Foundation ............................ $129,685
- North Valley Music School ................................... $84,825
- Project Whitefish Kids ........................................ $53,771
- Samaritan House ............................................ $38,360
- Shepherd's Hand Free Clinic ................................ $38,908
- Sparrows Nest of NW Montana ............................... $60,175
- Stumptown Art Studio ........................................ $32,062
- Tamarrack Grizzly Resource Center ......................... $35,473
- WAG—Whitefish Animal Group .............................. $38,720
- Whitefish Firefighters Association ........................... $35,741
- Whitefish Lake Institute ..................................... $60,674
- Whitefish Legacy Partners ................................... $85,244
- Whitefish Review ............................................ $30,995
- Whitefish Rotary Charitable Fund ............................ $20,794
- Whitefish Sports Facility Foundation ....................... $35,795
- Whitefish Theatre Co ......................................... $35,150
- Whitefish Veterans Support Team ........................... $74,150
- WSD Education Foundation .................................. $25,803
- WWF—Whitefish Winter Carnival ......................... $42,895

THE GREAT FISH COMMUNITY CHALLENGE in just three years running has raised over $4.5 million for more than 50 local charities. The Challenge is an innovative fundraiser that raises awareness for nonprofits and inspires our community to give during the eight-week campaign.

By matching donations to the participating nonprofits, Whitefish Community Foundation, through the Great Fish Community Challenge, has inspired hundreds of donors to give to enrich our community and change lives for the better.

2017 GREAT FISH COMMUNITY CHALLENGE FACTS BY THE NUMBER

$2M ................................ Raised in the 2017 Great Fish Community Challenge

$1,602,87 ................................ Raised by 45 Participating Charities

$407,460 ................................ Total Amount of Matching Grants Awarded

$15,500 ................................ Incentive Grants Awarded

1,557 ................................................ Donors Gave During the 2017 Challenge

48% ................................................ Match Awarded on the First $20,000 Raised by Each Nonprofit

By giving through the Great Fish Community Challenge, you not only help fund the important work of our nonprofit community, you also inspire others to donate and make good things happen in our communities.


FLATHEAD CANCER AID SERVICES

“FLATHEAD CANCER AID SERVICES” received $30,655 from the 2017 Great Fish Community Challenge. One patient we are assisting is a seventy-three year old gentleman, diagnosed in 2014, on a fixed income for two of $950/month. He continues to struggle with the extra costs of living that cancer has created. We recently paid for new tires, brakes, and a new windshield for his vehicle. For a rent reduction during the winter months, he plows snow on the property for the other tenants. To continue to do so this winter, repairs on his plow were needed so we paid for those.”

USE OF FUNDS: Raised funds will be used to pay the bills of eligible cancer patients and the families of pediatric cancer patients during their treatment. Additional funds will cover supplements often needed by oncology patients to maintain overall well being and hasten recovery from chemotherapy treatments.

(Photo): National Cancer Survivor’s Day attendees are all smiles at Flathead Cancer Aid’s Butterfly Release.

CASA

“The Great Fish Community Challenge has been instrumental in creating community awareness and excitement around supporting CASA FOR KIDS OF FLATHEAD COUNTY, along with many other wonderful local nonprofits. It has also enabled us to reduce the number of fundraising events we host every year and focus that time and energy on fulfilling our mission of providing an advocate to every abused and neglected child in Flathead County.”

USE OF FUNDS: Every foster child needs a guardian ad litem (GAL) to make sure their best interests are served. Funds help train and support CASA/GAL Advocates, and help provide specialized training through Fostering Futures in order to supply additional support and skill building opportunities.

(Photo): Great Fish Community Challenge helps CASA staff and volunteers promote awareness to further their cause.

CENTER FOR FLATHEAD RESTORATIVE YOUTH JUSTICE

“Participating in the Great Fish Community Challenge has allowed CRYJ to expand opportunities for youth in the Flathead Valley. Because of this support many of the Valley’s most ‘at-risk’ youth now have access to empowerment and skill building workshops and experiences.”

USE OF FUNDS: Funds raised through the Great Fish Community Challenge will provide at-risk youth with job skills training and mentorship—covering wages, uniforms, and food costs associated with garden-to-table Supper Club. In addition, a seasonal farm manager position, as well as garden supplies, and equipment will be funded.

(Photo): Center for Restorative Youth Justice Supper Club attendees tour the garden.
Whitefish Community Foundation recognizes the work of outstanding nonprofits each year with special awards that also pay tribute to the memory of special individuals we have lost. The nonprofits are selected for their dedication to enriching our community and making an impact on our community.

WAG-WHITEFISH ANIMAL GROUP operating the Whitefish Dog Park received the Great Fish Award for the significant benefit they provide the community and their outstanding participation in the Great Fish Community Challenge helping to raise awareness of the campaign for all the charities involved. The award comes with a $5,000 grant.

PROJECT WHITEFISH KIDS received the Doris Schumm Community Spirit Award for their dedication and work toward building a playground and pavilion at Smith Fields.

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

WHITEFISH LAKE INSTITUTE received the Russ and Mary Jane Street Community Service Award for their commitment to preventing the invasion of aquatic invasive species in Whitefish Lake.

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

MONTANA EQUESTRIAN EVENTS—HALT CANCER AT X INITIATIVE for their dedicated work to support nonprofits working to prevent cancer and assist individuals who have cancer.

The Jean Howard Memorial Award was established in 2016. Although Whitefish was Jean’s second home, the Whitefish Community Foundation and the community of Whitefish always came first. Jean cherished the first rate performing arts in Whitefish and the sense of community. Each year Jean supported many charitable causes in Whitefish and was active with the Whitefish Community Foundation. This special recognition comes with a $2,500 grant.
GIVING BACK TO OUR COMMUNITY
WHITEFISH MOUNTAIN RESORT

Since inception, over $950,000 from the PATRON SKI PASS PROGRAM has been awarded to area nonprofits through the generosity of WHITEFISH MOUNTAIN RESORT.

In 2017, the program provided over $111,351 in support to 60 local nonprofit organizations around the Flathead Valley. And, it is an annual source of support for the charitable work of the Whitefish Community Foundation.

The program makes possible the free ski pass program for 5th grade students each year. It is a major source of funding for DREAM Adaptive Recreation, supporting their work to assist individuals with disabilities, so they can enjoy winter recreation through the adaptive skiing program.

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

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

WHITEFISH LAKE GOLF CLUB

The PATRON GOLF PASS PROGRAM offers a limited number of transferable golf passes or two individual season passes. Since its inception in 2007, over $99,000 from the sale of golf passes has benefited the Community Foundation’s charitable work supporting our nonprofit community. Programs like the Patron Ski and Patron Golf provide necessary funding for the operations of the Community Foundation to ensure that the unrestricted donations to the foundation go to the many community grant programs offered each year.

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

BRIGHTER FUTURES

SCHOLARSHIP FUNDS

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

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

Setting up your own named scholarship fund is great way to support the education dreams of the youth and returning adult students in our community. Whitefish Community Foundation makes it easy for you to establish a scholarship fund. We will help you develop the selection criteria, distribute scholarship applications in the community, and handle all the administration of the program.

(Top left): Isabella Weida, 2017 recipient of the GRG R.I.S.E. Scholarship (Restaurant Industry Scholarship Endowment administered by the Whitefish Community Foundation) attends the University of Montana, and studies Exercise Science. Her long-term goal is to become a Physician’s Assistant. GRG, R.I.S.E. Scholarship is funded by the Glacier Restaurant Group through their Round It Up America program.

(Bottom left): “This year as a master’s student has flown by. While it has been the toughest yet, it has also been the most rewarding. All my regular coursework is wrapping up, so I am currently finishing up projects and prepping for finals. At the same time tax season is quickly approaching its end. I will very much miss working as a volunteer income tax preparer, but I am looking forward to April when we begin studying for the CPA exams! It is a busy time, but I am very lucky to be doing what I am. I have been blessed with so many opportunities that would not have been possible without MacKenzie River Pizza Co., Glacier Restaurant Group, and the Whitefish Community Foundation.”

—Amelia Reed, 2017 recipient of the GRG R.I.S.E. Scholarship
BUILDING SUSTAINABILITY

ENDOWED PHILANTHROPY

The Whitefish Community Foundation places high priority on developing endowment funds to increase sustainability for nonprofits. The Community Foundation helps local nonprofits build endowment funds through education, awareness, and grant programs. The following nonprofit organizations have set up permanent, non-revocable endowment funds with the Whitefish Community Foundation, demonstrating their commitment to building a sustainable source of funding to ensure the future of their programs:

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

AGENCY ENDOWMENT FUNDS

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

- 24

Endowment challenge grants of $5,000 each awarded in 2017 to nonprofits holding endowments with WCF

- 3

Grants distributed from endowments to nonprofits in 2017

- $255,678

Total distributions from endowment funds since program inception in 2004

- $1.1M

THE MONTANA ENDOWMENT TAX CREDIT

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

WHITEFISH COMMUNITY LIBRARY

“The Whitefish Community Foundation and the Whitefish Community Library have been partners for many years. Being the 5th largest library in the state, with our major source of funding provided by City of Whitefish taxpayers, requires careful budgeting—especially since our service area extends far beyond Whitefish and Flathead County. Our endowment provides funding for items the budget cannot cover. The Whitefish Community Library is confident that our endowment is being managed by the professional team at the Whitefish Community Foundation and this partnership has ensured that our community has access to all the services that larger libraries offer. Their support is vital to our continued growth and success.”

—Joey Kositzky
Director of Whitefish Community Library

(Photo): Grandmother reads to her grandson in the Kid’s Corner of the Whitefish Community Library before Story Time.

HUMANE SOCIETY OF NORTHWEST MONTANA

“Providing life-saving care for homeless pets is a 24/7 commitment, there are no holidays. To meet our mission, we depend on community support and sustainable sources of income, which is why our Whitefish Community Foundation Designated Endowment Fund is so critically important. Our Endowment Fund enriches the quality of life for homeless cats & dogs by providing them with critical animal care and it affirms our life-long commitment to pets and the people who love them. We are honored to partner with the Whitefish Community Foundation.”

—Lori Heatherington
Executive Director of Humane Society of NW Montana

(Photo): Brian, a Humane Society of NW Montana volunteer feeds resident cat, Katie.

NORTH VALLEY HOSPITAL

“Our organization is grateful that the Whitefish Community Foundation manages our endowment. We can assure our donors that the endowed funds are handled by experts who are knowledgeable and professional. The benefit we get for this well-organized and quality service is recognized by our donors, supporters, volunteers, and staff.”

—Alan Satterlee
Executive Director of North Valley Hospital Foundation

(Photo): Patient receives screening on North Valley Hospital’s new digital mammography machine.
INVESTMENT COMMITTEE
John B. Collins, Chair
Retired, CEO | John B. Collins Associates
Jeff Allen
Technology Industry
David Dittman
President | First Interstate Bank
Jay Latimer
Retired | Entrepreneur
Jamie Shennan
Venture Capital | Trinity Ventures
Dave Stewart
Retired | International Banking
Ken Wessels
Retired, CEO | Wessels, Arnold & Henderson
John Witt
Retired | Bill Matrix Corporation

INVESTMENT RESULTS 2017

FINANCIAL DISCLOSURES
Investment Firm: Mason Investment Advisory Services, Reston, Virginia
Investment Manager: Allison Gormier
CPA: Sallie Foley, JCCS, CPAs, PC, Whitefish
Custodian: TD Ameritrade

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

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

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

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

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

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

DONOR ADVISED FUNDS
$2 M ................. Awarded from Donor Advised Funds
$2.9 M ............... Awarded from Designated Funds
$14.7 M ............ Donor Advised Fund assets

FINANCIAL STEWARDSHIP

INVESTMENT ADVISORY SERVICES

The Whitefish Community Foundation is a public foundation, operating under sections 501(c)(3) and 509(a)(1) of the Internal Revenue code as a public charity.

www.whitefishcommunityfoundation.org

The Whitefish Community Foundation is a public foundation, operating under sections 501(c)(3) and 509(a)(1) of the Internal Revenue code as a public charity.

The Whitefish Community Foundation is a public foundation, operating under sections 501(c)(3) and 509(a)(1) of the Internal Revenue code as a public charity.

Earnings on the invested principal is retained by the fund to support grant making and administrative expenses.

We strive to ensure that the investments are managed in a manner consistent with our mission.

FINANCIAL STEWARDSHIP

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

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

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

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

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

DONOR ADVISED FUNDS
$2 M .................. Awarded from Donor Advised Funds
$2.9 M ................ Awarded from Designated Funds
$14.7 M .............. Donor Advised Fund assets

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BY THE NUMBERS

ASSETS ........................................ TOTAL
Donor Advised Funds.................. $14,715
Agency Endowment Funds............. $6,648
WCF Endowment Fund.................. $5,517
Agency Funds.............................. $1,324
Designated Funds....................... $1,223
Gift Annuity Funds..................... $629
WCF Community Grant Funds........ $396
General Operating Funds............. $184

TOTAL ASSETS YEAR END ............. $28,636

COMPOSITION OF ASSETS
2017 YEAR END (IN THOUSANDS)
TOTAL ASSETS $28.6 M

BY THE NUMBERS

OPERATING REVENUE
Fundraising Programs............... $143,668
Endowment Distribution............. $130,000
Fund Admin Fees...................... $127,275
Contributions.......................... $100,447
Operating Expenses.................. $474,357

$10.6 M Gifts to the Foundation
$5.8 M Grants from the Foundation
896 Grants Awarded
188 Nonprofits Received Grants

ENRICHING OUR FUTURE

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

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

LEGACY SOCIETY MEMBERS
Anonymous (4)
Carol and Richard Atkinson
Cameron Blake and Sandy Gray
Caryl and Bob Bennett
Anne and John Collins
Martha and Jeffrey Hamilton
Connie and Jake Heckathorn
Joaquenia and Klaus Heinrich
Kristin and Gregory Hetzer
Fay and Peter Jones

Herbert Kameon Trust
John Kramer Jr.
Janice and Paul McCann
Doris Schumm *
Janna and Jamie Sherman
Dave Stewart
Mary Jane and Russ Street *
Virginia V. Weldon
Susan and John Witt *
* Deceased

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

Call us to learn more or to set-up your Legacy Fund: 406-865-1781

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

Herbert Kameon Trust
John Kramer Jr.
Janice and Paul McCann
Doris Schumm *
Janna and Jamie Sherman
Dave Stewart
Mary Jane and Russ Street *
Virginia V. Weldon
Susan and John Witt *
* Deceased

(WCF | Annual Report 2017)
THANK YOU 2017 DONORS who give directly to support Whitefish Community Foundation programs. Every gift counts. Thank you for helping us make a difference in our community.

Gallagher, Mike and Barbara *  
Garrison, Greg and Kathy Gersh, Judah and Tanya *  
Gersh, Robert and Kathryn *  
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Glacier Jet Center *  
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Jones, Byron and Brenda *  
Jones, Samuel and Patricia Kelton, Bill and Charli Koch Philipp, Ken and Lisa Kramer, John *  
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Latimer, Jay and Mignon *  
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Losleben, George / Connie Johnson Lovasz, Greg *  
MacCarter, Dan and Karen MacDonald, Denise *  
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Mansfield, Patrick and Mary Matelich, Ron and Swinthin McGrath *  
McCann, Paul and Janice *  
McCarty, Charles and Anne Lexitte *  
McGowan, Greg and Dana Babb McGowan *  
McKeever, Marlin/Anne Casey McKeever *  
McMechen, Jim and Jean/Ane Schoene *  
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Schmidt, Mark and Shirley Scutchion, John and Misty *  
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Smith, Will and Bonnie Sollberg, Loren Solberg, Richard and Jane *  
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Sramek, Joseph and Deanne *  
Stock, Jim and Lisa Stark, Warren and Teresa Stebbins, Orthodontics Stein, August and Jennifer Sterling, Steven and Jennifer *  
Skeen, Kristi and Chad *  
Sinson, Alan and Lisa Stroud, James and Jill Sukkari, Fadi and Rawi Sarji Sumpolt, Joe and Sherry Tabor, Joe and Kristin Tannenhill, Bruce and Grae Cleveland *  
Taylor, Kent and Kim The_Hays, Menlo Park *  
Third Street Market Thompson, Steve/Nancy Woodruff Tim Murphy State Farm Insurance Tinkler, Richard and Edie *  
Toulousse, David and Jeannine Trundell, John and Sylvia *  
Tumba, Needham and Joy Van Vlack, Matt/Courtney Giawason* Vanterpool, Amy and Darby VanVliet, John and Linda Voyles, Robbi and Lori *  
Vukovich, Russ *  
Walton, William and Dori *  
Warland, Alan and Boots *  
Watts, Shawn/Bernadette Duperron Weldon, Virginia/Francis Austin *  
Wendell, Stephen and Linda Wessels, Ken and Byrnie *  
Whisle, Steven and Ardy *  
Whitefish Animal Hospital, PC *  
Whitefish Credit Union *  
Whitefish Lake Restaurant *  
Whitefish Eye Center Whiston, Robert and Reta Whiting, Bill and Linda Young, Allison *  
ZGC, Inc. Ziegler, James *  
IN MEMORY OF:  
Manly Brown Gotlib Peter “Lee” Brockel Carolyn Doney Smith Jean Howard Don Nelson Sharron Pearson John Puffer Doris Schumm IN HONOR OF:  
Richard and Carol Atkinson Tanya Gersh Paul Johannsen Thomas and Christina McClure Jame Jennings Allyson Sikola Brian Tanko Boots Warnick *  
Indicates donors who have made a charitable contribution annually for the past five consecutive years. BOLD indicates donors who have made a charitable contribution annually for the past ten consecutive years.
LEADERSHIP BOARD OF DIRECTORS

Jeff Allen
Technology Industry

Carol Atkinson
Retired, Codebreaker and Writer

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Retired, Micro Electronics

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

Diane Conradi
Attorney, Conradi Anderson

Joe Gregory
Business Owner

Jay Latimer
Secretary/Treasurer
Retired, Entrepreneur

Sherry Lesar
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Vice Chair
Owner, Buffalo Cafe

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Founding Member, F.A.C.E.S. and Sweetwater Spectrum

Monica Pastor
Business Owner, Underscore Art Gallery
Instructor FVCC

Doug Reed
Owner of Whitefish Lake Restaurant

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

Shawn Watts
Technology Consultant

Ken Wessels
Board Chair
Retired, Wessels, Arnold & Henderson

John Witt
Retired, COO, Bill Matrix Corp.

OUR TEAM

Linda Engh-Grady
President

Daria Perez
Vice President Finance & Operations

Lynnette Donaldson
Donor Relations

Kayla Nickells
Marketing and Events

Linda Hobbs
Special Projects

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

(Left to right): Kayla Nickells, Daria Perez, Linda Engh-Grady, Lynnette Donaldson, and Linda Hobbs.

(Left to right): Kayla Nickells, Daria Perez, Linda Engh-Grady, Lynnette Donaldson, and Linda Hobbs.