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

2016 EXTRA MILE DAY PROCLAMATION
Presented to Whitefish Community Foundation by the City of Whitefish with a proclamation by Mayor John Muhlfeld

Photo Credit: Cover Photo - Whitefish Lake and Whitefish Mountain, Courtesy Chuck Haney; Back Cover - Bob Marshall Wilderness, Courtesy Cassidy Grady.

Whitefish Community Foundation  whitefishcommunityfoundation.org
What is Whitefish Community Foundation?

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

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

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

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

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

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

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

Ken Wessels Board Chair

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

GIVING TOGETHER
GROWING TO SERVE

$20M Combined Assets under management
$9M Donor Advised Fund Assets
$8.6M Endowment Fund Assets

84 Total number of funds held by WCF
43 Donor Advised Funds
24 Permanent Endowment Funds
WHERE GIVING IS AMPLIFIED

COMMUNITY GRANT PROGRAMS

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

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

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

GIVING TOGETHER

COMMUNITY GRANT PROGRAMS

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

$5M Total amount of Designated Grants awarded since 2008

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

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

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

Supporting Whitefish Legacy Partners recreation and conservation efforts.

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

Assisting Child Bridge with training and expanding their adoption programs.

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

**GIVING TOGETHER**

**MAJOR COMMUNITY PROJECT GRANTS**

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

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

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

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

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

GIVING TOGETHER
CIRCLE OF GIVING

Community minded individuals giving together for the common good.

$414,000
CIRCLE contributions in 2016 directly benefitting community grant programs offered by Whitefish Community Foundation.

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

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

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

JOIN THE CIRCLE OF GIVING and BECOME A GREAT FISH CHALLENGER
$1,486,546!

Great Fish Challenge Color Run 2016. Photo Credit Whitefish Pilot Matt Baldwin
WHERE A COMMUNITY IS INSPIRED

WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

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

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

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

GIVING TOGETHER

$1,486,546 RAISED

2,400

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

INVESTED

$322,000

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

IMPACTED

43

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

GREAT FISH COLOR RUN AND COMMUNITY CELEBRATION

Glacier Nordic Club

Farm Hands

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

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

~Deidre Corson, Executive Director, North Valley Music School
<table>
<thead>
<tr>
<th>Organization</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Abbie Shelter</td>
<td>$46,491</td>
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<tr>
<td>Alpine Theatre Project</td>
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<td>Backpack Assistance Program</td>
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<td>Glacier Symphony and Chorale</td>
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<td>Glacier Twins AM Legion Baseball</td>
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<td>North Valley Hospital Foundation</td>
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<td>North Valley Music School</td>
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<td>Stumptown Art Studio</td>
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<td>Tamarack Grief Resource Center</td>
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<tr>
<td>Whitefish Veterans Support Team</td>
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The Backpack Assistance Program (BAP) has greatly benefited from the Great Fish Challenge. The funds that we have received have enabled us to distribute 84 food bags every Friday to help supplement children in need. Each bag is filled with 5 servings of fresh fruits and vegetables, as well as cans of tuna, hot cereal, noodles, and pepperoni sticks. We also provide 275 food bags for school closure days and spring break. Without the Great Fish Challenge, these additional distributions wouldn’t be possible.

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

~Traci Stolte, Volunteer Director
Backpack Assistance Program
GIVING BACK TO OUR COMMUNITY

WHITEFISH MOUNTAIN RESORT

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

In 2016, the program provided over $93,000 in support to 62 local nonprofit organizations around the 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, a total of $77,000 from the sale of golf passes has benefited the Community Foundation’s charitable work supporting our nonprofit community. Programs like the Patron Ski and Patron Golf provide necessary funding for the operations of the Community Foundation to ensure that the unrestricted donations to the foundation go to the many community grant programs offered each year.

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

PRINCIPALS AND PRACTICES OF NONPROFIT OVERSIGHT

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

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

~Cameron Blake, Executive Director, Glacier Nordic Club

2016 Nonprofit Attendees:

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

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

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

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

GIVING TOGETHER
HELPING NONPROFITS

974 Number of nonprofits serving Flathead County

221 Number of nonprofits in the Whitefish area

Working together we will change lives for the better both today and tomorrow.
WHERE FUTURES ARE MADE BRIGHTER FOR ALL

SCHOLARSHIP FUNDS

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

Consider establishing a scholarship fund:

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

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

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

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

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

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

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

GIVING TOGETHER
AGENCY ENDOWMENT FUNDS

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

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

$243,970

$1.1M

Grants distributed from endowments to nonprofits in 2016.

Total distributions from endowment funds since program inception in 2004.
The Montana Endowment Tax Credit helps build charitable endowments while offering donors a federal income tax savings and a state tax credit. It can help you avoid federal capital gains tax. If you are interested in learning how you can earn up to $10,000 in a state tax credit ($20,000 if filing jointly) call us at 406-863-1781 or visit www.whitefishcommunityfoundation.org.

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

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

JEAN HOWARD MEMORIAL FUND

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

Bill Howard, Jean’s husband, along with friends and family, made gifts in her memory to the following individuals and organizations:

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

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

Whitefish Community Foundation establishing the Jean Howard Memorial Fund.

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

DONORS TO THE JEAN HOWARD MEMORIAL FUND

Aitken, Aitken & Cohn, LLP
Allergen, Inc.
Stella Arbitman
David Batson
Diane Bohack
Francis and Carol Breidenbach
Stephen and Diana Bulkeley
Sarah Burt
Tod and Susan Campbell
Valerie Cantwell
Gillen Causey
Gina Christman
Monte Collins and Deborah Slimmer
Charles and Judith Crockett
George and Patricia Davis
Mark Davis
Diana Defulviis
John and Zoila Di Re
Charles Diiorio
David and Frances Dittman
Brian and Shelly Ehler
First Interstate Bank
Dennis and Kathryn Gauhan
Stephen Geane and Jeanne Boyce
David Grady and Linda Engh-Grady
Herman and Donna Hakala
Brad and Cheryl Howard
Harrison Howard
James and Donna Howard
Steve and Jodi Howard
Thomas and Judith Howard
William Howard
Thomas Jablonowski and Janet Keuper
Gregory Kishel
John and Christine Lentz II
Mac MacLean
Mayfair West 2 Summer Team
Gerard and Heather Mercier
Edward Millett
Mitch-Stuart, Inc - Michelle Cohen and Stuart Paskow
Bruce Moses
Robb and Jendy Nen
John and Rosalie O’Brien
Kevin and Leslie O’Brien
Jeff and Carol Payetta
Milton and Mary Perlow
Albert and Joyce Pincek
Mary Porter
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Thomas Reitz and Marianne Plunkett
Janice Reyes
George Saltzberg
SC Hydraulic Engineering
David and Tammie Schulman
Richard and Diane Schwartz
Scott and Carol Singer
Jon and Karen Stallings
The Ueberroth Family Trust
Richard and Judith Voltmer Foundation
Russell and Diane Walters
Webb Family Foundation
Tracy Wood
Project Whitefish Kids, a volunteer organization that maintains the Smith Fields recreation and sports complex, received the 2016 Great Fish Award in recognition of their outstanding performance during the Great Fish Community Challenge.

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

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

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

WHITEFISH FIREFIGHTERS ASSOCIATION

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

Whitefish Community Foundation is honored to recognize the Whitefish Firefighters Association as the 2016 recipient. Whitefish Firefighters Association is an active nonprofit that works to raise critical funding to improve emergency services for Whitefish. The organization was founded in 2005. They have been an active participant in the Great Fish Community Challenge in both 2015 and 2016 raising money for emergency equipment.
Doris Schumm was a dear friend to the Whitefish community and the Whitefish Community Foundation. Her bequest to the Foundation in 2011 established the Doris Schumm Community Spirit Award. Now in its 5th year, the special award recognizes an organization that embodies the spirit for community that Dorie embraced.

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

FINANCIAL DISCLOSURES

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

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

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

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

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

Creating a Donor Advised Fund is simple:

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

GIVING TOGETHER

DONOR ADVISED FUNDS

43  Donor Advised Funds

$1.9  Grants distributed from Donor Advised Funds in 2016

$9 M  Donor Advised Fund assets under management

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

Donor Advised Funds help renovate the North Valley Music School.

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

Donor Advised Funds support conservation, education, and sustainability projects in Glacier National Park through the work of Glacier National Park Conservancy.
2016 BY THE NUMBERS

758 Grants Awarded to 157 Nonprofits totaling over $4.2M

COMPOSITE OF GRANTS 2016 YEAR END
in thousands

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

COMPOSITE OF GIFTS 2016 YEAR END
in thousands

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

Expenses (in thousands)

- Grants $4,273
- Programs $242
- General Operating $69
- Fundraising $35

10yr GROWTH OF GRANTS

Whitefish Community Foundation whitefishcommunityfoundation.org
ENRICHING THE FUTURE OF WHITEFISH

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

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

LEGACY SOCIETY MEMBERS
Anonymous (2)
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

John Kramer Jr.
Janice and Paul McCann
Doris Schumm*
Janna and Jamie Shennan
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: 406-863-1781.

LEAVE A LEGACY

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

~Maya Angelou
THANK YOU 2016 DONORS!

Donors who directly support Whitefish Community Foundation programs.
Gifts designated to nonprofits through the Great Fish Challenge were acknowledged in the Great Fish Challenge Report and should also be included in each nonprofits annual report.

* 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.

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

* Indicates donors who have made a charitable contribution annually for the past five consecutive years. **BOLD** indicates donors who have made a charitable contribution annually for the past ten consecutive years.
McGovern and Company  
McGowan, Greg and Dana  
McGowan, Kenneth and Dorothy  
McKeever, Marlin and Maureen  
Mechem, Jim and JeanAnne Swope  
Meislik, Jerry and Rhona  
Milisci, Chris and Abbie  
**Miller, Ronald and Jean**  
Minner, Don and Barbara  
Mitchell, Robert and Molly  
Montana Basement Solutions  
Montana Community Foundation  
Moody, Karl and Carol  
Moran, R. Matthew and Ellen  
Moran, Thomas A.  
Moses, Bruce  
Mountain Mini Storage  
Mumma, Harlan and Nancy Hyde  
Murzin, Mark and Kris Knorschild  
National Parks Realty of Whitefish  
**Nelson Hardware, Inc.**  
Nelson, Leif and Gloria  
Newton, Roland & Jo  
Northwest Imaging, PC  
Northwest Parts & Equipment Co.  
O’Brien, Kevin and Leslie  
O’Connor, Helen  
Oglesby, William and Audrey  
Oleson, Doug and Beverly  
O’Neil, Marcia  
O’Neil, Robert and Christy  
Origitano, Thomas and Claudine  
Oscadal, Francis and Joanne  
Palmer, Andy and Desi  
Parkside Credit Union  
Pastor, Monica  
Pasvogel, Linda  
Penz, Lori  
Perez, Daria and Juan  
Peschel, Laura  
Pohl, Richard and Carol  
Pomerantz, Benjamin and Alison  
Porro, Lonnie  
Potthoff, Ronald and Julie  
Procida, John and Clarisse  
QuietSpacing LLC  
Quinn, Thomas and Teresa  
Ralston, Henry and Rita  
Randall, Kim  
Reed, Doug and Nikki  
Reger, Joseph and Lizzanne  
Reid, Louisa  
Reilly, Hugh and Teresa  
Reisch, Duane and Dawn  
Repke, John and Beth  
**Ridder, Christopher and Susan**  
Moffitt  
Rogers, Robert  
Rosenberg, Ron and Karen  
Roston, Francine  
Ruhana, George and Kim  
Rygg, Charlene  
Sanderude, Scott and Julia  
Satterlee, Alan  
Schlinger Family Foundation  
Schmidt, Mark and Shirley  
Schwartz, Richard and Diane  
Schwartz, Scott  
Scurlock, Jon and Misty  
Seeds, Charles and Susan  
Shaw, Tim and Hillary  
Shennan, Jamie and Janna  
Silverman, Paul and Constance  
Sliiter, Justin and Jennifer  
Smith, Elvira  
Smith, Mike  
Smith, Will and Bonnie  
**Solberg, Richard and Jane**  
Spain, Amy  
Spragg, Roger and Carole  
**Stanley, Christine**  
Stark, Warren and Teresa  
Stebbins Orthodontics  
Stein, Morris and Catherine  
Sterling, Steven and Jennifer  
Stevens, Richard and Ellen Johansen  
Stevens, Robert and Margaret  
**Stewart, David**  
Stimpson, Kim and Kelly  
Strosahl, John and Judith  
Stumpton Snowboards  
Sukkarie, Fadi and Rawa Sarji  
Swander, Amy  
Tabor, Joe and Kristin  
Tannehill, Bruce and Gail Cleveland  
Taylor, Kent and Kim  
Taylor, Loren  
The Cuisine Machine  
Third Street Market  
Thompson, Amy  
Thompson, Janice  
Thompson, Steve and Nancy Woodruff  
Tim J. Murphy Insurance Agency  
Tinkler, Richard and Edie  
Torgeson, Pat and Cynthia Sillers  
Trundle, John and Sylvia  
Van Vlack, Matt and Courtney Gwiazdon  
Voyles, Robb and Lori  
Walker, Luke  
Walton, William and Dori  
Ward, Benjamin and Katherine  
Warrick, Alan and Boots  
Weldon, Virginia and Francis Austin  
Wendfeldt, Stephen and Linda  
Wessels, Ken and Robin “Byrdie”  
Whisler, Steven and Ardy  
White, Daniel  
Whitefish Animal Hospital, PC  
**Whitefish Credit Union**  
**Whitefish Lake Restaurant**  
**Whitefish Mountain Resort**  
**Whitten, Ben and Roberta**  
Williams, David and Judy  
Williams, Timothy and Amy  
Wise, Doug and Bet  
**Witt, John and Susan**  
Wolf, Trisha  
Woodruff, Richard and Ann  
Yerger, Wirt and Linda  
Young, Alison  
YourCause, LLC  
Yunck, Tami  
Ziegler, David  
Ziegler, James  
**IN HONOR OF:**  
Richard and Carol Atkinson  
Francis Austin and Virginia Weldon  
Luther and Dorothy Campbell  
Judy Hewson  
John Kramer  
Carol Lewensohn  
Wallace Opdycke  
JeanAnne Swope  
Brian Tanco  
John Zoltek  
**IN MEMORY OF:**  
Warren and Demi Archibald  
Marilyn Brown  
Ed and Jean Chauner  
Cheryl Engh  
Jean Howard  
John Puffer  
Doris Schumm  
Carolyn Doney Smith  
Chet Wram
PRESIDENT’S CIRCLE:
Mike Jenson 2000 - 2004
Dave Stewart 2005 - 2007
Paul Johannsen 2008 - 2010
Carol B. Atkinson 2011 - 2013

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Janice Case
Ian Collins
Connie Heckathorn
Bill Howard
Dana McGowan
Misty Scurlock
Richard Solberg
Boots Warrick
Virginia V. Weldon

OUR TEAM:
Linda Engh-Grady
President
Daria Perez
Vice President Finance and Operations
Lynnette Donaldson
Finance Assistant
Kayla Nickells
Marketing and Events
Linda Hobbs
Special Projects

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

Giving Together to enrich our community through the Whitefish Review.

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