WE’RE ALL IN THIS TOGETHER

2020 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.
The Whitefish Community Foundation began 2020 with our eyes to the future as we contemplated a celebration for our 20-year anniversary. What quickly transpired was a global pandemic that literally rocked our world. Yet, under the leadership of our visionary Foundation team we remained true to our mission of promoting philanthropy, even through this year of great uncertainty. Our 2020 annual report tells the story of what we can accomplish together when we connect committed donors with inspired nonprofit partners to lift up all who live and work in our communities.

I am proud to report that the Whitefish Community Foundation awarded over $4.3 million to Flathead Valley nonprofits in 2020. At the heart of this generosity sits our Circle of Giving donors. This unique group of individuals has entrusted us with the financial resources necessary to grow all our grant programs year after year. They continue to support the work of hundreds of Flathead Valley nonprofits, including our own Foundation’s operations, and work to inspire others to give.

Building these and many other trusted relationships through the years is what enabled us to move quickly with financial assistance when it was most needed last spring. With vital programs in jeopardy the Foundation was able to create a Community Emergency Response Fund. To date, 216 donors have funded $243,000 in grants that continue to address the urgent needs of neighbors struggling with the effects of the pandemic. We also partnered with 78 Valley nonprofits in a Day of Giving campaign. This 28-hour campaign raised another $500,000 to support the urgent operating needs of the participating nonprofits and had the added benefit of introducing us to Valley nonprofits and donors that were new to us. Our 6th annual Great Fish Community Challenge presented its own set of difficulties at a time when our nonprofits were desperate for support. Whitefish Community Foundation led the charge, and 55 nonprofit partners were able to energize donors over the course of a 7-week campaign, awarding $3.2 million in grants and breaking all previous records!

While 2020 was a difficult year for so many, my hope is that this report highlights the profound impact we can have in our Flathead Valley communities when we work as one. As we look to the future and our growing Valley, it is the interdependence of all our communities that becomes the glue that strengthens all of us. Quite simply, we can make a bigger impact when “we’re all in this together.”

Linda Maetzold
Board Chair
2019-2021
John and Anne Collins

“We’ve been amazed by the many ways WCF has supported a broad range of nonprofits that are important to us in the arts, social services, and helping families in need.”

–John and Anne Collins

Anne and I met in Whitefish in the summer of 1964 while still in college. After spending many summer and winter vacations here, we were able to return to live full-time in 1986. We’ve been fortunate to see our children and grandchildren grow up in this delightful small town and have enjoyed being surrounded by family and friends.

Early on, Anne became involved in Whitefish Theater Company, Glacier Symphony, and the development of the Stumptown Ice Den facility. Later, Anne served as a CASA advocate for many years. I participated on the Flathead Valley Ski Foundation board and, after retiring from business activities, joined the Whitefish Lake Institute and Whitefish Community Foundation boards. So, it has been highly rewarding for both of us to see community services grow in the Whitefish area. In particular, we’ve been amazed by the many ways WCF has supported a broad range of nonprofits that are important to us in the arts, social services, and helping families in need.

John and Anne Collins have been active supporters of Whitefish Community Foundation programs for over 10 years and have been members of the Circle of Giving for the past 5 years. John joined the Board of Directors in 2015 and helped launch the Foundation’s Endowment Tax Credit Program. Today, John serves as the Community Foundation’s Investment Committee Chair.
Jim Watson and Carol Bibler

“We began giving to the Great Fish Challenge in 2015 after seeing how much it was helping local nonprofits,” Carol noted. “And this year we established a donor-advised fund with the Whitefish Community Foundation. We will use it to support local charities, and appreciate that the administrative fees stay here in our community to support the work of WCF.”

Carol Bibler grew up in Kalispell and moved away after graduating from Flathead High School in 1976. She always considered the Flathead home, however, and after living in other parts of Montana as well as western Colorado, moved back in 2001 with her husband, Jim Watson, and their son.

“Giving back” to the community was instilled in Carol from an early age. Her father, Sam Bibler, was a driving force in the preservation of Kalispell’s Conrad Mansion, and he undertook several other civic improvement projects from the 1960s through the 1990s. He and his wife, Jean, were supporters of Flathead Valley Community College, and though both of them passed away in 2002, the Bibler Foundation opens the doors and gardens of their former home to the public each spring and summer in support of student scholarships at FVCC.

Over the past 19 years Carol and Jim have been active in their community, playing key roles in expanding Herron Park and completing the Foy’s to Blacktail Trail, and serving on local and state boards including the Montana Land Reliance, Montana Conservation Corps, and Montana Tree Farm steering committee. Jim remains active with Foy’s to Blacktail Trails and enjoys mentoring youth as a Hunter Education instructor.

“Philanthropy means looking forward…meeting not just today’s needs, but considering what can benefit our community the most in years to come.”

-Jim Watson and Carol Bibler
"We married very young and quickly had 6 children and today our immediate family has grown to 30 including our 16 grandchildren. We love to spend time together as a family and found a piece of property close to Whitefish Mountain Resort where we have built a home. The area offers us a wide variety of outdoor activities and incredible scenery, and the people of Whitefish are so very friendly and have made us feel right at home. It is important to our family that we be contributing members of the communities where we live. We were very pleased to learn about the Whitefish Community Foundation. It is a wonderfully managed organization, and we were impressed with its Circle of Giving Program, and the Great Fish Challenge. We are grateful for the opportunity to participate in the Whitefish community through the foundation.”

Mark and Robyn Jones were born and raised in Alberta and enjoyed the Whitefish area growing up. Mark spent summers at Lake Blaine and Robyn skied at Big Mountain. To them, Logan’s Pass, in Glacier National Park, is one of the most beautiful places on earth. In the summer, Mark would take his skis and hike up above the Logan’s Pass Visitor Center, ski down, then repeat over and over again like only a teenage boy can do. This past year, Mark and Robyn found out that the Big Mountain Firefighters Association was raising money for a new fire truck and they stepped up and purchased it for them. Whitefish Community Foundation assisted with the gift transaction.

"We are grateful for the opportunity to participate in the Whitefish community through the foundation.”

-Mark and Robyn Jones
“When we moved to Whitefish seven years ago for Ben to start his practice, we had no idea what a special community we were about to join. Since then, we have found a kind and welcoming town in which to raise our kids and amazing opportunities to recreate all year round. We have also made wonderful friends and met so many people who are invested in improving our community. Philanthropy is important to us, and we love that the Whitefish Community Foundation makes a difference where we live, helping nonprofits of all sizes make tangible improvements to Whitefish and the rest of the Flathead Valley. We love that the Circle of Giving underpins the Great Fish Challenge, allowing local nonprofits to focus their fundraising on one campaign and then freeing them up to actually accomplish the projects and goals they are dedicated to for the rest of the year. We love looking around our community and seeing the impact of our giving—and the donations of so many others—at work. We are proud to support the Whitefish Community Foundation, so that all members of the community have access to amazing resources right where they live.”

Ben and Katie Ward have been involved with many projects in Whitefish over the years, including the new playground and pavilion at Smith Fields. Katie served on the Whitefish Community School Board and volunteers with the Writing Coaches Program of the Whitefish Education Foundation. Ben is busy with his orthopedic surgery practice. They have been members of the Circle of Giving for the past 3 years.

“We are proud to support the Whitefish Community Foundation, so that all members of the community have access to amazing resources right where they live.”

-Ben and Katie Ward
THE CIRCLE OF GIVING is the Whitefish Community Foundation’s core group of donors. It is comprised of generous donors who see the value of philanthropy and what it can do to change lives. Circle donors support the mission of the Foundation with an annual gift of $5,000 or more, with some donors giving as much as $50,000. The Circle allows our donors to pool their resources to create the maximum amount of impact multiplied over hundreds of worthy causes. The Circle is the backbone of the Great Fish Community Challenge and makes it possible to organize and provide a strong matching grant each year. 95% of gifts made to the Circle of Giving directly support the Foundation’s grant programs and the Great Fish Community Challenge, while 4% of the gifts help to underwrite the operations of the Whitefish Community Foundation.

Names in **bold** represent donors who have given to the Circle Level for 5 years or more, demonstrating their long-term commitment to improving the quality of life in the Flathead Valley.

* Indicates new donors to the Circle.

Anonymous (1)
AGL Foundation
Carla and Richard Atkinson
Julie and Summerfield Baldridge
Ledgie and Phillip Ballard*
Sharon and Dean Balluff
Charlene and Stephen Baronch
Cindy and Mogens Bay
Betsy and Bill Bayne
Dorothy and James Beighlol
Linda and Terry Bell*
Bonnie and Richard Dilani*
Mary Ann and Wiliam Bindley
Sandy and Dick Boyce
Beth and Jerome Brussard
Rockwood Brown
in memory of Marilyn Lindsey and Todd Burns*
Dorothy and Luther Campbell
Eileen Boci Campbell
Janice and James Case
Maureen Casey
Karen and Nick Chickering
Jare Kollmeyer and Terry Chute
Marie and Brian Clark*
Dyan and Michael Colby*
CK and Jim Coles
Anne and John Collins
Linda Comatt
Beverly and Lawrence Dale*
Scott Durenwald*
Candy and Eddie DeBartolo
Beth and Marvin Deam*
Lynnette and Mark Donaldson*
Debbie and Robert Douglas
Nora and Blake Durlosp
Margaret Askew and Patrick Foley*
Fun Beverage*
Barbara and Mike Gallagher
Laura and James Garbars
Kathy and Greg Garrison
Caeli Quinn and Denny Gignoux
Cheryl Watkins and Dick Gordon
Linda Englhardt and David Grady
Cynthia Gromme*
Colleen and Peter Grant
Sarah and John Graves
Cameron Blake and Sandy Gray*
Cindy and Joe Gregory
Shelley and John Griffith
Jill and Christopher Geilbrey
Jes and John Hogue
Mary Lloyd and Richard Harding
Stephanie and Fred Hamann
Mango and Gary Harrod*
Shannon and Brian Haycox
Kelly and Robert Hayes*
Patty and Bob Hayes
Jill and Grant Henderson*
Kristin and Gregory Hieter
Suzanne Daniel and Richard Hildner*
Bill Howard
Cheryl and Brad Howard
Ilia B. Dousman Fund
Shelton and Rob Jacobson*
Iron Horse Foundation
Barbara and Mike Jenson
Ann and Paul Jeremiassen
Ann and Bill Jones*
Robyn and Mark Jones*
Rachel Kelton
Maureen and John King
Jon McBride and John Kramer
Julie and Marshal Kushnick*
Mignon and Jay Latimer
Gerry and Frank Lefkowitch
Sherry and Dave Lesar
Linda and Charlie Maertzold
Allison and Rick Magnuson
Janet Mayo
Lori Miller
Ellen and Matt Moran
Barbara Morris
Nicola Ospdyle
Sandy and Dan Peet*
Teresa and Tom Quinn
Nikki and Doug Reed
Melinda and Rick Reed*
Susan and Hank Rickel
Karen and Ron Rosenberg
Kim and George Ruhana*
Stacy Schillinger
Mark Schmidt
Mare and Mike Shaw
Jamma and Jamie Shennan
Lucy Smith
Carole and Roger Spragg
Margaret and Robert Stevens*
Nancy and David Stokes
Jill and Jim Stroud
Linda and Andrew Viers
Lori and Robb Voyles
Dori and Bill Walton
Katherine and Benjamin Ward
Leslie and Mike Warming
Boots and Alan Warrick
Carol Biber and Jim Watson
Byrdie and Ken Wessels
Ardy and Steve Whisler
Judy and David Williams
Mary and Hol Williams
Bet and Doug Wise
Susan and John Witt

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

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

We thank the following donors for their support of the Circle of Giving:

**2020 ALLOCATION:**
- 60% Great Fish Community Challenge
- 24% Community Grants, Discretionary Grants, Major and Micro Grants
- 12% Community Emergency Response Fund
- 4% Whitefish Community Foundation’s Operations

$1,050,000 Donated to the Circle of Giving Program 2020

100 Donors in 2020

$10,000 Average Gift Size
WHAT IS THE GREAT FISH COMMUNITY CHALLENGE?

THE GREAT FISH COMMUNITY CHALLENGE has raised over $13M in just 6 years for 68 participating nonprofits. The Challenge is an efficient fundraising opportunity that inspires greater giving and participation from the community. It brings the community together to support local nonprofits in a single, high profile, and collectively beneficial event. Each charity receives designated gifts from the public and the Community Foundation provides matching grants.

2020 GREAT FISH COMMUNITY CHALLENGE BY THE NUMBERS:

$3,282,861
RAISED IN THE 2020 CHALLENGE FOR 56 CHARITIES

56%
MATCH ON THE FIRST $20,000 RAISED
BY EACH PARTICIPATING CHARITY

$601,254
TOTAL MATCH AWARDED
MAXIMUM MATCHING GRANT OF $11,200

14%
INCREASED PERCENT RAISED THROUGH THE 2020 CHALLENGE OVER 2019

$280,000
COST TO ORGANIZE THE 2020 GREAT FISH COMMUNITY CHALLENGE

TOTAL RAISED
BY THE NONPROFITS PARTICIPATING IN THE 2020 GREAT FISH COMMUNITY CHALLENGE INCLUDING THE MATCH

$3,282,861

- Abbots Shelter ..........................................................$111,182
- Alpine Theatre Project ..............................................$86,455
- Backpack Assistance Program .................................$76,878
- Big Brothers Big Sisters NW Montana .....................$36,137
- Bob Marshall Wilderness Foundation .......................$51,199
- CASA for Kids .........................................................$128,013
- Center for Restorative Youth Justice .........................$59,843
- Child Bridge ..............................................................$100,678
- DREAM Adaptive Recreation ....................................$96,302
- Farm Hands-Nourish the Flathead .........................$110,299
- Flathead Area Mountain Bikers ...............................$35,249
- Flathead Audubon Society ........................................$23,523
- Flathead Cancer Aid Services .................................$31,075
- Flathead Food Bank .................................................$51,439
- Flathead Land Trust ..................................................$55,823
- Flathead Rapids Youth Soccer .................................$31,950
- Flathead Valley Community College Foundation .......$76,359
- Flathead Valley Ski Education Foundation ...............$25,641
- Flathead Youth Home ..............................................$63,921
- Friends of Flathead Avalanche Center ......................$31,797
- Glacier Institute .........................................................$40,550
- Glacier National Park Conservancy .........................$74,237
- Glacier Nordic Club ..................................................$38,397
- Glacier Symphony & Chorale .................................$59,899
- Habitat for Humanity of Flathead Valley .................$46,148
- Hockaday Museum of Art .........................................$33,031
- Housing Whitefish ....................................................$12,745
- Humane Society NW Montana .................................$132,718
- Intermountain Children’s Services .........................$33,592
- Lighthouse Christian Home & Services ...................$57,518
- Montana Children’s Medical Center .......................$46,590
- Montana Conservation Corps .................................$36,572
- Nate Chute Foundation ............................................$70,685
- North Valley Food Bank ...........................................$84,184
- North Valley Hospital Foundation .........................$62,867
- North Valley Music School .......................................$89,928
- North West Montana Veterans Food Pantry ..............$45,152
- Nurturing Center ......................................................$31,802
- Project Whitefish Kids .............................................$53,120
- Ravenwood Natural Science Center .........................$31,058
- Samaritan House .....................................................$83,678
- Shepherd’s Hand Free Clinic ....................................$69,258
- Sparrow’s Nest of NW Montana ...............................$97,006
- Stumptown Art Studio .............................................$42,384
- Stumptown Ice Den ...............................................$34,786
- Whitefish Community Center .................................$30,184
- Whitefish Community Foundation .........................$21,535
- Whitefish Lake Institute ..........................................$58,855
- Whitefish Legacy Partners .......................................$106,344
- Whitefish Library Association .................................$22,210
- Whitefish Review ......................................................$38,032
- Whitefish Rotary Charitable Fund ............................$40,904
- Whitefish School District Education Foundation .......$44,289
- Whitefish Theatre Company .....................................$82,069
- Whitefish Veterans Support Team .........................$63,239
- Wings .................................................................$31,160
**GREAT FISH SPECIAL AWARDS**

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

**GREAT FISH AWARD:**
$7,500 awarded to Farm Hands – Nourish the Flathead  
Farm Hands is focused on providing access to healthy, local food for those who cannot afford it.

**JEAN HOWARD MEMORIAL AWARD:**
$5,000 awarded to Nate Chute Foundation  
The Nate Chute Foundation reduces suicide in western Montana through their training and education programs.

**RUSS & MARY JANE STREET COMMUNITY SERVICE AWARD:**
$2,500 awarded to Stumptown Art Studio  
Stumptown Art Studio provides art programs for people of all ages and abilities.

**DORIS SCHUMM COMMUNITY SPIRIT AWARD:**
$2,500 awarded to Flathead Area Mountain Bikers  
Flathead Area Mountain Bikers promote and improve mountain biking activities throughout the Flathead Valley.

**CORPORATE CITIZENSHIP AWARD:**
Glacier Bank was an outstanding participating business in the 2020 Challenge.  
$2,500 to charity of choice – Whitefish Rotary Charitable Fund for “Gotta Go Bathrooms”

**UPSTREAM AWARD EXEMPLARY LEADERSHIP:**
$2,500 awarded to Samaritan House  
Samaritan House provides food, shelter, and resources for the homeless in the Flathead Valley.

**BIGGEST CATCH AWARD:**
$2,500 awarded to Abbie Shelter  
(357 donors in the Challenge)  
The Abbie Shelter offers mental health services and a 24-hour hotline to help domestic and sexual violence survivors in the Flathead Valley.

**THE NURTURING CENTER**

The Nurturing Center will be able to serve and support over 3000 families in Flathead County with the funds received from these generous Great Fish Community Challenge donations. We will continue to help families with necessary items for raising healthy children such as diapers, wipes, and formula; provide parenting education and support to various caregiver populations such as grandparents, foster parents, and step-parents; and the Nurturing Center will now be able to help additional families who did not qualify for child care scholarships but still have the daily expense of quality licensed childcare.

–Kalie Hansen Adoretti,  
Executive Director of the Nurturing Center

**DREAM ADAPTIVE RECREATION**

The feeling of isolation is one of the most reported obstacles faced by individuals with disabilities, even more so now with the pandemic. DREAM exists to break down barriers and provide access to the many social, emotional, and physical benefits of outdoor recreation. The Great Fish Community Challenge plays a major role in our annual fundraising goals and allows us to expand our critical services. Funds from the Great Fish account for nearly one-third of our annual income, which allows our small staff to place more focus on direct program support. Thank you for believing in our mission! Thank you for the opportunity to share our gratitude with those who contributed during the challenge!

–Julie Tickle, Executive Director

**FLATHEAD YOUTH HOME**

The kids who come to the Flathead Youth Home have experienced significant loss, trauma, struggles with mental health issues, and addictions. Our greatest hope is to help them stand, face their pain, and begin the long, beautiful, challenging, life-changing journey toward healing. Funding from all of our donors to the Great Fish Community Challenge and the Whitefish Community Foundation match infuses all that care with tangible support and a message of hope and togetherness. We celebrate the amazing generosity of this community that has never been more evident than in this year’s Great Fish Challenge and the gathering of donors that make an indelible difference/impact.

–Hannah Plumb, FYH Development Coordinator
CUMULATIVE GIVING

This Cumulative Giving Report represents giving over a lifetime to the Whitefish Community Foundation. Annual, unrestricted gifts are made directly to the Community Foundation. Once donors reach $50,000 or more in unrestricted cumulative giving, they are recognized on the cumulative giving page.

COMMUNITY IMPACT 2000–2020

Whitefish Community Foundation has awarded millions of dollars to local charities over the last 20 years through the competitive grant programs, Great Fish Community Challenge, Day of Giving & Unity and more. We are truly grateful to all our donors who have partnered with us to address serious community needs, especially in this unprecedented time.

Our Cumulative Giving Report is a recognition of our community’s doers and givers, who have worked with us and continue to work with us to make a serious impact in our communities. Many of these donors have been giving with WCF for over 10 years and some since the Foundation opened its doors 20 years ago. For all your giving, we humbly thank you!

Our communities are experiencing incredible growth due to the pandemic. People are shifting how and where they live and work. This shift is bringing new opportunities and challenges to our communities. We need to work together on complex issues that include affordable housing, family and child homelessness, inequities, drug addiction, preserving natural resources, and so much more.

Whether you live here part-time or full-time, we have all chosen Flathead Valley as our home, and as residents of this great place, it is our duty to get involved, give, volunteer, and care about where we live. We can solve complex issues only if we come together. No matter what you do, where you live, or how you live, one thing is for sure, we really are all in this together!

Linda Engh-Grady
President,
Whitefish Community Foundation

This page recognizes some very dedicated donors whose cumulative giving over the past 10 years has made an extraordinary impact on the work of the Community Foundation and the greater Flathead Valley.
COMMUNITY GRANT PROGRAM

The COMMUNITY GRANT PROGRAM helps nonprofits of all sizes with projects and programs benefiting the Flathead Valley. The Community Grant Program is often the gateway program for small nonprofits getting involved with Whitefish Community Foundation. Two grant cycles are offered each year and nonprofits can apply once annually for up to $4,000.

- Back Country Horsemen of the Flathead - Flathead River trailhead improvements | $4,000
- Bigfork Rotary Foundation - Bigfork School District backpack program | $4,000
- Braveheart Chaplain Ministry - Chaplain service for first responders | $2,000
- Casting for Recovery - Breast cancer survivor's retreat | $1,200
- CF-WF High School Swim Teams - Support self-funded high school swim teams | $4,000
- Christmas at Our House - Community Christmas event | $2,000
- City of Whitefish - Stumptown Summer Day Camp | $4,000
- Climate Smart Glacier Country - Plastic symposium, wildfire smoke adaptation strategies | $3,000
- Code Girls United - Online coding program | $4,000
- Columbia Falls Schools Bookmobile - Literacy and food delivery program | $4,000
- Flathead County Sheriff's Posse - Purchase body armor | $4,000
- Flathead Shelter Friends - Veterinary care vouchers for senior pet adoptions | $1,000
- Flathead Warming Center - Support low-barrier homeless shelter | $4,000
- Foys to Blacktail Trails - Reconstruction of Herron Park trail drainage | $4,000
- Gap Fillers Flathead - Summer hygiene kits for at-risk students | $1,000
- Gateway to Glacier Trail - Trail construction and maintenance in Columbia Falls | $2,000
- Girls on the Run Flathead Valley - Running programs for 3rd to 8th grade girls | $3,000
- Glacier Children’s Museum - Interactive learning exhibits | $1,500
- Groove at the Trail - Free musical performances in nursing homes | $2,000
- Kalispell Education Foundation - Support teacher-driven classroom projects | $2,000
- Montana Kayak Academy - Free river safety and kayak instruction | $1,500
- Montana Wild Wings Recovery Center - Purchase food for 22 education raptors | $2,000
- Northwest Montana Historical Society - Preservation of Ed Gilliland photo collection | $2,258
- Riding on Insulin - Subsidize camp for children with Type 1 diabetes | $2,000
- Tamarack Grief Resource Center - Support grief programs | $3,000
- The Vital Ground Foundation - Permanently protect Montana's Yaak Valley | $2,000
- Whitefish Safe Grad Night - Safe high school graduation celebration | $2,000

COMMUNITY GRANT AWARDS

- Back Country Horsemen of the Flathead - Flathead River trailhead improvements | $4,000
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MAJOR COMMUNITY PROJECT GRANTS

$629,000 AWARDED SINCE PROGRAM INCEPTION IN 2010

Major Grants of $10,000 or more have been awarded to capital projects in the areas of health and human services, arts and culture, water conservation, veteran services, and more.

$10,000 Grant to ALPINE THEATRE PROJECT for the purchase of 20 wireless microphones that will support their ATP Kids and professional theatre productions. The ATP Kids Program serves over 300 kids from all over the Flathead each year. The program has grown so much that in 2020, ATP added a session for grades 1-8 in the late spring. The mission of ATP Kids is to foster confidence, creativity, collaboration, and empathy in local students through participation in theatre. No student is ever turned away, resulting in over 20% of students receiving scholarship assistance.

$15,000 Grant to WHITEFISH ROTARY CHARITABLE FUND for Smith Fields Sports Complex Gotta Go Bathrooms Project. ADA compliant double-unit bathrooms will be purchased and installed next to the ADA compliant playground equipment and pavilion, small soccer fields for young players, and two Babe Ruth baseball diamonds. 40,000+ athletes, siblings, coaches, parents, friends, fans, and others use the facilities annually.

$15,000 Grant to THREE RIVERS EMS to help purchase ambulance cardiac monitors. Three Rivers EMS is an independent, nonprofit ambulance service located in Columbia Falls. The organization provides Advanced Life Support care to a large rural area including Columbia Falls, Hungry Horse, Martin City, Coram, West Glacier, Glacier National Park, Essex, and mutual aid to Evergreen and Whitefish. Three ambulances respond to 1,400 911 calls annually with a paramedic and an Emergency Medical Technician (EMT) 24 hours a day, 365 days a year.

TOTAL FOR 2020: $71,458

SPRING $39,200
FALL $32,258

WCF | Annual Report 2020

WCF | Annual Report 2020
**Day of Giving & Unity**

Day of Giving & Unity, a Giving Tuesday Event, was established in 2020 in response to the COVID-19 pandemic. With the economic downturn caused by COVID-19, many nonprofits were canceling events, and struggling to keep their programs running. The 28-hour campaign was met with tremendous support. 78 nonprofits from around the Flathead and Eureka participated in the event that raised over $560,000 in its inaugural year. Whitefish Community Foundation provided a $1,000 match to nonprofits that raised $2,000 or more during the Day of Giving campaign. It is a collaborative fundraiser, designed to raise operating dollars at no cost to participating organizations.

The significant expenses associated with Day of Giving & Unity, including staff support, marketing, and administration, were all paid by Whitefish Community Foundation as a community service. The majority of the funds were donated through the Foundation’s online platform, but donors were also able to give by check. Local branches of First Interstate Bank and Glacier Bank partnered as drop off locations for donations during the 28-hour event.

<table>
<thead>
<tr>
<th>Total Amount for Nonprofits Including Match: $562,645</th>
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<tbody>
<tr>
<td><strong>TOTAL AMOUNT FOR EACH NONPROFIT INCLUDING MATCH:</strong></td>
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<tr>
<td><strong>28 HOURS OF GIVING IN CAMPAIGN</strong></td>
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<tr>
<td><strong>$1,000 MATCH AMOUNT EACH NONPROFIT RECEIVED</strong></td>
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<tr>
<td><strong>78 NUMBER OF BENEFITING NONPROFITS</strong></td>
</tr>
<tr>
<td><strong>$562,645 TOTAL AMOUNT GRANTED</strong></td>
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**Helping Our Communities Together**
COMMUNITY EMERGENCY RESPONSE FUND

2020 required many pivots of our staff and our community in response to the COVID-19 pandemic and social turmoil. This page of the annual report is about how Northwest Montanans responded in unprecedented ways to an unprecedented crisis, highlighting the collaborative efforts of working side by side with donors and partners, who stepped in and responded to provide resources and relief.

AWARDED TO CHARITIES EXPERIENCING AN UPTICK IN SERVICES THEY PROVIDE AND IMPACTED NEGATIVELY BY COVID-19

26 GRANTS FUNDED
$229,900 GRANTS AWARDED

216 NUMBER OF DONORS
$309,000 AMOUNT DONORS CONTRIBUTED

- Flathead Food Bank and North Valley Food Bank to bring in a semi load of non-perishable food ........................................ $20,000
- Flathead Food Bank to provide more resources for the Backpack Food Distributions .................................................. $10,000
- Flathead Food Bank to fund increased distribution demands ......................................................................................... $15,000
- North Valley Food Bank to fund the “Restaurants Making Healthy Meals for Families Program” ........................................ $10,000
- North Valley Food Bank for additional funds to the “Restaurants Making Healthy Meals for Families Program” ................ $10,000
- North Valley Food Bank to continue the “Restaurants Making Healthy Meals for Families Program” .............................. $10,000
- Columbia Fall Food Bank to fund the “Restaurants Making Healthy Meals for Families Program” .................................... $5,000
- Columbia Falls Food Bank to purchase hamburger and bread for distribution ................................................................. $2,000
- Whitefish Community Center to support increased demands for Meals on Wheels ......................................................... $5,000
- Abbie Shelter-Violence Free Crisis Line to support increased capacity and staffing ....................................................... $10,000
- Farm Hands/Nourish the Flathead to increase food bag distribution in Columbia Falls School District ....................... $10,000
- Farm Hands/Nourish the Flathead to support increased demand of the weekly food bag distribution in Columbia Falls School District ................................................................. $10,000
- Whitefish Housing Authority to start an Emergency Rental Assistance Program providing rental assistance up to $300 to workers recently laid off .......................................................... $10,000
- Whitefish Housing Authority to continue the Emergency Rental Assistance Program to provide rental assistance of up to $300 to workers ........................................................ $10,000
- Flathead Youth Homes to support 24/7 youth home staffing and protecting children ................................................... $7,500
- Sparrow’s Nest of NW Montana to support increased staffing due to 24/7 staffing requirement ........................................ $7,500
- Samaritan House to support the creation of an Emergency Homeless Shelter ................................................................. $10,000
- Samaritan House to purchase two additional washing stations ......................................................................................... $2,150
- Flathead Warming Center to purchase tents and sleeping bags for homeless residents being turned out due to shelter closing ......................................................................................................................... $2,500
- Shepherd’s Hand Free Clinic to set up Project HELLO! for COVID-19 response ............................................................... $1,000
- Big Brothers Big Sisters to organize activities and learning for Littles now homebound .............................................. $1,250
- North Valley Hospital Foundation to purchase a GenMark Lab Instrument for COVID test analysis ........................... $20,000
- Backpack Assistance Program for Summer Snack Program ................................................................................................. $7,000
- Samaritan House to expand the capacity of the shelter and to accommodate social distancing ........................................ $20,000
- The WAVE to assist with COVID-19 Adaptation ................................................................................................................. $14,000

“RESTAURANTS MAKING HEALTHY MEALS FOR FAMILIES PROGRAM” was grown from an idea of Chef Andy Blanton from Café Kandahar, as a way for restaurants to put idle kitchens to work during the COVID-19 closures in 2020. Local restaurants made over 5,515 meals, and local food banks administered the program and distributed the weekly meals to individuals and families in need. Nine restaurants from Whitefish and four restaurants in Columbia Falls participated in the program. The Emergency Response Fund awarded $30,000 to North Valley Food Bank and $5,000 to Columbia Falls Food Bank to support this program.
WHAT IS A DONOR ADVISED FUND?

Whitefish Community Foundation can help you make your charitable giving purposeful and effective. Our experienced staff will make giving easy, effective, and enjoyable. We provide donors with insight into community needs. We aim to simplify your giving by taking care of all the administrative work.

When you open a Donor Advised Fund with Whitefish Community Foundation, 100% of your gifts go to charitable causes, even the administrative fees support the work of the Community Foundation. Open a Donor Advised Fund with us. The benefits are great!

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.

Donations you make to the Whitefish Community Foundation qualify for the maximum available charitable deduction in the year the gift is made. Establish a Donor Advised Fund and distribute the gift over a matter of time.

***ENDOWED FUNDS***

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

**$15,000***

***DESIGNATED FUNDS***

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

**$5,000***

***DONOR & CORPORATE ADVISED FUNDS***

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

**$5,000***

***AGENCY FUNDS***

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

**$50,000***

*minimum to open

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

**ENDOWED FUNDS** live 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.
One major lesson learned in 2020 is how important Permanent Endowment Funds are to our nonprofit programs. When our state was shut down and fundraising events were canceled, one source of revenue a nonprofit could count on was the income from their permanent endowment. 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.

Endowed donor advised funds encourage generational giving
Donors can also take advantage of Permanent Endowments. Endowing a Donor Advised Fund allows the fund to grow over time and increase a donor’s capacity to give. Endowed Donor Advised Funds can be passed down in the family to involve the next generation in charitable giving. An Endowed Donor Advised Fund is similar to a private foundation, but without all the management and additional costs.

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

If you would like to learn how the Montana Endowment Tax Credit could work for you, call us at 406-863-1781.

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

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

Anonymous (5)
Carol and Richard Atkinson
Mary Van Buskirk and Roger Barber
Dorothy and Luther Campbell
Terry Chute and Jane Kollmeyer
Anne and John Collins
C. Granmo Fund
Connie and Jake Heckathorn*
Joaquenia and Klaus Heinrich
Kristin and Gregory Hetzer
Thomas A. Hughes, III
Fay and Peter Jones
Herbert Kameon Trust*
John Kramer Jr.
Janice and Paul McCann
Rhana and Jerry Mesik
Blake Reese Memorial Legacy Endowment
Susan and Henry Ricklefs
Dean A. Robbins (Wiley Homestead)
SBB Fund
M & S Schmidt Fund
Doris Schumm*
Janna and Jamie Shennan
Dave Stewart
Mary Jane and Russ Street*
Jordan and Travis Taylor
Virginia V. Weldon
Susan and John Witt
*Deceased

LEGACY FUNDS

If you have planned a gift in your will, trust, or other deferred gift mechanism with Whitefish Community Foundation as the beneficiary, please let us know. You can make a bequest in your will and connect it to a Legacy Fund at WCF. The Community Foundation will set up a permanent fund designated to your favorite charities and distributed according to your wishes.

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

“Dean Robbins, Legacy Society

“My roots in the Flathead Valley originally were planted in 1883 when my maternal great-grandparents homesteaded in the Lower Valley north of Somers. As a result of personal experiences, I feel a profound sense of place and of gratitude in my bond with Northwest Montana. I have relished my backpacking and hiking adventures in the open spaces of the greater Bob Marshall Wilderness, Glacier National Park, and closer locales in the Flathead Valley. The local displays of human creativity in art and music by area residents help to fill the human soul with joy. The special relation possible between undeveloped landscape and human creativity can produce even greater inspiration for people to live joyfully.

I want to ensure that my financial resources can continue to enrich this unique area and its larger community after my earthly life has ended. To achieve this goal, within my estate planning, I have established a Legacy Fund with the Whitefish Community Foundation. Through my Legacy Fund, I intend to support various efforts, including the Flathead Land Trust, the Bob Marshall Wilderness Foundation, the Glacier Symphony Orchestra and Chorale, the Hockaday Museum of Art, and the Intermountain Deaconess Children’s Services.”
Whitefish Community Foundation’s Kids Fund—Giving Voice to Children was established as an initiative to address child homelessness in the Flathead Valley. The goal of the Kids Fund is to support small and large-scale programs in the areas of health, safety, and education that mitigate challenges and prevent local youth from becoming homeless.

In 2020, the Kids Fund awarded CASA for Kids a multi-year grant of $90,000 to launch FOCUS, a youth case management program providing support to children ages 14-23 as they age out of foster care. Older foster youth are among the most vulnerable populations in the Flathead. Many become homeless the day they age out of foster care, and 20%-30% will become homeless before age 26.

Nonprofits in our community deliver crucial services to Flathead Valley residents. The Kids Fund initiative will continue to expand its reach, and support innovative ideas to change the outcome for this vulnerable population.
For the past few years, Nonprofit Development Partnership (NpDP) has been a program of the Flathead Community Foundation. In 2020, Flathead Community Foundation closed its doors and transferred NpDP over to Whitefish Community Foundation to allow it to continue. NpDP was joined with Whitefish Community Foundation’s Nonprofit Development Program and will continue offering free monthly workshops for local nonprofits. The program will focus on key areas of nonprofit management to improve oversight, transparency, accounting, governance, and more. Workshops will continue to be led by Whitefish Community Foundation staff and local nonprofit consultants, including Ned Cooney, Chany Ockert, and Jane Ratzlaff. NpDP programs are funded by the Dennis and Phyllis Washington Foundation, Tamarack Foundation, and the NpDP Permanent Endowment Fund.

Whitefish Community Foundation makes it easy to establish a scholarship fund. Setting up a fund is a great way to support the education dreams of youth and returning students in our communities.

Whitefish Community Foundation is pleased to work with businesses and individuals to establish scholarship programs that give back to our community and help young adults reach their educational goals. Whitefish Community Foundation streamlines the entire process by helping individuals and businesses develop selection criteria, guiding candidates through the online application process, and investing the scholarship fund with the objective of preserving value and fostering growth. We administer the program from start to finish, communicating with the schools and students. Our program is professionally managed and easy for students to apply through our online application.

**ACTIVE SCHOLARSHIP FUNDS:**
- Glacier Restaurant Group-R.I.S.E Scholarship Program
- Montana Coffee Traders Scholarship Program

Mike Gwiazdon was a local figurehead in the Flathead Valley. He moved to the Flathead in the early 60’s from Minnesota and his decades-long career took him from proverbial “ski bum” to the CEO of Sportsman and Ski Haus. He started working for the Sportsman and Ski Haus in 1973, running the ski department. He became a partner in the company in 1981 and later transitioned Sportsman into the employee-owned model it is known for today. Mike served as the CEO of Sportsman and Ski Haus until the mid-2000s, overseeing the company’s growth from a local sporting goods store to a major retailer in three states.

He was active in the Whitefish and Kalispell communities, serving on Whitefish City Council from 1997 to 2001, and 6 years on the Kalispell Chamber of Commerce board of directors. He was a philanthropist and passionate about his community. Mike volunteered for Whitefish Legacy Partners and was part of the early fundraising committee to establish the widely used trails at Lion Mountain and Beaver Lakes. Mike supported many causes personally and through the Sportsman and Ski Haus’s generous corporate philanthropy program. He participated early on when the Whitefish Community Foundation started the Patron Ski Pass Program to help support local charities and the Community Foundation.

Mike sought a unity between the Flathead Valley communities by developing the Sportsman and Ski Haus in both Whitefish and Kalispell. As a skier, hunter, golfer, and all-around outdoorsman, Mike valued everything about the Flathead Valley. He will be remembered not only for the caring and loving husband, father, grandfather, and friend he was, but also for his pioneering spirit for turning a small sporting goods store into an employee owned corporation, able to compete with regional and national retailers. Mike left a wonderful legacy behind and he will be missed by all who were fortunate to know him.

**IN MEMORY OF:**
- Marilyn Brown
- Carolyn Doney Smith
- Darlene Grattan
- Mike Gwiazdon
- Eric Hosek
- Jean Howard
- Barbara Kaiser Burch
- Roland Newton
- James Reep
- Phil Rygg
- Maureen Sawey
- Doris Schumm

**IN MEMORIAM**

**MIKE GWIAZDON (1941-2020)**

Cassidy Grady
**BY THE NUMBERS**

**COMPOSITION OF ASSETS 2020 YEAR END**

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<tr>
<th></th>
<th>As of December 31</th>
<th>2020</th>
<th>2019</th>
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<td>Total Assets</td>
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<tr>
<td>Total Contributions</td>
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<td>$6,741,000</td>
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<td>Total Additions to Agency Funds</td>
<td>$832,000</td>
<td>$195,000</td>
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<tr>
<td>Total Gifts</td>
<td>$8,743,000</td>
<td>$6,936,000</td>
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<tr>
<td>Total Grants &amp; Programs</td>
<td>$7,504,000</td>
<td>$5,584,000</td>
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<tr>
<td>Total Grants from Agency Funds</td>
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<td>$26,000</td>
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<tr>
<td>Total Grant Distributions</td>
<td>$8,208,000</td>
<td>$5,610,000</td>
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</table>

**HIGHLIGHTS**

- **1,387** NUMBER OF GRANTS AWARDED
- **$5,918** AVERAGE GRANT AMOUNT
- **$38,177** AVERAGE PER NONPROFIT RECIPIENTS

**INVESTMENT COMMITTEE**

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

Jeff Allen  
Technology Industry

Janice Case  
Trustee | Thrivent Mutual Funds

David Dittman  
President | First Interstate Bank

Greg Garrison  
Retired, Vice Chairman | PAC

Jay Latimer  
Retired | Entrepreneur

Jamie Shennan  
Venture Capital | Trinity Ventures

Ken Wessels  
Retired, CEO | Wessels, Arnold & Henderson

John Witt  
Retired | Bill Matrix Corporation

**FINANCIAL STEWARDSHIP**

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

**INVESTMENT RETURNS (ANNUALIZED)**

**BALANCED POOL ALLOCATION**

- **SAFETY**: 31%
- **INCOME**: 31%
- **GROWTH**: 31%
- **AGGRESSIVE**: 15%

**ANNUITY POOL ALLOCATION**

- **SAFETY**: 31%
- **INCOME**: 31%
- **GROWTH**: 31%
- **AGGRESSIVE**: 15%

**LONG-TERM GROWTH ALLOCATION**

- **SAFETY**: 31%
- **INCOME**: 31%
- **GROWTH**: 31%
- **AGGRESSIVE**: 15%
THANK YOU 2020 DONORS!

Thank you for helping us make a difference in our community. Giving together we make great impact. The following donors gave directly to Whitefish Community Foundation programs:

Please see file for full list of donors.

chris@whitefish communityfoundation.org | 406-862-3141 | whitefishcommunityfoundation.org | 1604 W. 1st Ave., Whitefish, MT 59937

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GIVING TOGETHER

OUR TEAM
- Linda Engh-Grady: President
- Daria Perez: Vice President Finance & Operations
- Lynnette Donaldson: Programs and Outreach Officer
- Holly Richardson: Marketing & Events
- Madeline Axtell: Donor Services Associate (not pictured)
- Linda Hobbs: Special Projects
- Jill Seigmund: Grants and Program Associate (not pictured)

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

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.

ANG TOGETHER
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contact@whitefishcommunityfoundation.org
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