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.
FROM THE BOARD CHAIR

THANK YOU FLATHEAD VALLEY.

Dear Friends and Supporters,

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

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

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

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

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

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

Together, we grow.

With heartfelt appreciation,

Greg Garrison
Board Chair

FROM THE
PRESIDENT/CEO

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

Our $61 million in assets do not represent the riches of one individual or corporation but instead represent the aggregate of our community voices. We manage community dollars to help solve community issues. The Flathead Valley is undeniably special, and Whitefish Community Foundation works directly with donors, community leaders, and nonprofits to help keep it that way.

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

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

Alan Davis
President/CEO

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

$1,909,451
DONATED TO THE CIRCLE OF GIVING PROGRAM IN 2023

32
NEW CIRCLE MEMBERS IN 2023

$10,654
AVERAGE GIFT SIZE IN 2023

2023 ALLOCATION:

<table>
<thead>
<tr>
<th>DIRECT GRANTS TO LOCAL NONPROFITS</th>
<th>81%</th>
<th>19%</th>
</tr>
</thead>
<tbody>
<tr>
<td>WHITEFISH COMMUNITY FOUNDATION</td>
<td></td>
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</tr>
</tbody>
</table>

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

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

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

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

- Brian and Marie Clark, Circle of Giving members
THANK YOU TO OUR CIRCLE OF GIVING MEMBERS

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

Anonymous (3)
Kate and Chip Andrews
Brent Appelgren
Valerie and Beau Armstrong
Jo-Ann and Jim Armstrong
(Kiita Foundation)
Mary Dojnik and IV Ashton
Lisa and Bob Bailey
Julie and Summerfield Baldridge
Ledi and Phillip Ballard
Sharon and Dean Baltzell
Charlene and Stephen Barasch
Trish and Rick Bartoszewicz
Dee and Jim Beightol
Tierney and Jon Beizer
Linda and Terry Bell
Bonnie and Rick Billuni
Mary Ann and Bill Bindley
Annie and Todd Bloom
Mary Ann and Bill Bindley
Bonnie and Rick Billuni
Linda and Terry Bell
Tierney and Jon Beizer
Linda and Terry Bell
Bonnie and Rick Billuni
Mary Ann and Bill Bindley
Annie and Todd Bloom
Lori Miller
Betty and Doug Bickert
Janet Malone
Allison and Rick Magnuson
Jodi Linn and John Martin
Danielle and Peter Grant
Cameron Blake and Sandy Gray
Jeanine and Ken Green
Perk and Jim Groschup
Dyan and Michael Colby
Liz and Stewart Coleman
C. K. and Jim Coles
Linda Compton
Stacy and Michael Covey
Felice and Dow Crocker
Katherine and Gordon Cross
Beverly and Larry Dale
Nici and J.D. Dabiner
Scott Darkenwald
Candy and Eddie DeBartolo
Jane and Gary Decker
Lynnette and Mark Donaldson
Myra and Michael Doyle
Nora and Blake Dunlop
Kate and Ross Dworman
Lynn and Ben Dykstra
Jennie and Andrew Eckstrom
Margaret Davis and Bruce Ennis
First Interstate BancSystem Fdn
Margarite Askew and Patrick Foley
Kate and Michael Fraser
Kirsten and Pult Fuller
Barbara Gallagher
Laura and James Garbacz
Kathy and Greg Garrison
Janelle Gentry
Marion Gerrish
Jamie and Michael Goguen
Adele Goldberg
Cheryl Watkins and Dick Gordon
Linda Eng-Grady and Dave Grady
Cindy Gramm
Colleen and Peter Grant
Cameron Blake and Sandy Gray
Jeanine and Ken Green
Perk and Jim Groschup
Jan and John King
Julie Williams and Marshal Kushniruk
Cindy and Tom LaChance
Mignon and Jay Later
Gerry and Frank Leichtf
Susan Stevens and David Littleton
Maureen Bolton and Edwin Losjeski
Krisen Smek and Josh Lozman
Allison and Rick Magnuson
Janice and James Case
Annie and John Collins
Sarah and John Graves
Cindy and Joe Gregory
Ila B. Dousman Fund
Iron Horse Foundation
Barbara and Mike Jenson
Ann and Paul Jeremiasen
Jan McBride and John Kramer
Sherry and Dave Lazer
Linda and Charlie Maetzold
Lynnette and Mark Donaldson
Robyn and Mark Jones
Ann and Bill Jones
Sharon and Bill Kahlke
Melissa and Pierre Kaptanian
Melinda and Mike Kartsonis
Rachel Kelton
Gina and A.J. King
Maureen and John King
Julie Williams and Marshal Kushniruk
Cindy and Tom LaChance
Mignon and Jay Later
Gerry and Frank Leichtf
Susan Stevens and David Littleton
Maureen Bolton and Edwin Losjeski
Krisen Smek and Josh Lozman
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Sherry and Dave Lazer
Linda and Charlie Maetzold
Laura Reynolds and Walter Rowntree
Kim and George Ruhana
Charlene Rygg
Julie and Scott Sanderude
Mark Schmidt
Liz and Kevin Scholten
Jennifer and Tyler Seibert
Marie and Mike Shaw
Marla and Van Shaw
Austine and Vassilis Siomos
Ashley and G. Stacy Smith
Jill and Kevin Smith
Linda Smith
Lucy Smith
Claudia and Samuel Smith
Martha and William Smith
Lisa and Jim Stacks
Jen and Gus Stein
Margy and Rob Stevens
Kelly and Kim Stimpson
Lisa and Al Stinson
Nancy and David Stokes
Summit Beverage
Meg and Chris Temple
Edie Tinkler
Quinn Family
Karen and Ron Rosenberg
Stacy Schlinger
Janna and Jamie Shennan
Carole and Roger Spragg
Lori and Rob Voyles
Dori and Bill Walton
Boots and Alan Warrick
Byrdie and Ken Wessels
Andy and Steve Whisler
Susan and John Witt

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

AGL Foundation
Teri and Jeff Allen
Carol and Richard Atkinson
Cindy and Megan Bay
Betsy and Bill Boyne
Sandy and Dick Boyce
Jan Mayo
Libby and Murray McBride
Valeri and Allan McGarvey
Rhona and Jerry Meislik
Abbie Milisci
Lori Miller
Emmy and David Montanye
Betty Mondoza
Ellen and Matt Moran
Barbara Morris
Gloria and Leif Nelson
Marilyn and Rick Nelson
Amy Johannes and Doug Newton
Terrie and Tom Nitopi
Pam and Randall Onstead
Claudine and T.C. Origianao
Val and Larry Parsons
Sandy and Dan Perle
Coco and Ross Pickert
Blanche Puffer
Nikki and Doug Reed
Melinda and Rick Reed
Reggie’s Quick Lube
Sue and Hank Rickfes
Katie and Mike Robinson
Jan Mayo
Libby and Murray McBride
Valeri and Allan McGarvey
Rhona and Jerry Meislik
Abbie Milisci
Lori Miller
Emmy and David Montanye
Betty Mondoza
Ellen and Matt Moran
Barbara Morris
Gloria and Leif Nelson
Marilyn and Rick Nelson
Amy Johannes and Doug Newton
Terrie and Tom Nitopi
Pam and Randall Onstead
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Val and Larry Parsons
Sandy and Dan Perle
Coco and Ross Pickert
Blanche Puffer
Nikki and Doug Reed
Melinda and Rick Reed
Reggie’s Quick Lube
Sue and Hank Rickfes
Katie and Mike Robinson

Names in bold represent donors who have given at the Circle level for five years or more, demonstrating their long-term commitment to improving the quality of life in the Flathead Valley.
The ninth annual Great Fish Community Challenge raised a record-breaking $6,262,929 for 77 Flathead Valley nonprofits. The key to the Challenge’s success is the Great Fish Match, made possible by our growing Circle of Giving and other donors who contribute. The Match inspires thousands of other donors to give, resulting in a 23% increase in funds raised during the Challenge in 2023. For many local nonprofits, the Challenge has transformed their organization by providing an efficient platform to build awareness, connect with new donors, and raise critical operating funds.

**$28M RAISED SINCE INCEPTION IN 2015**

**$6,262,929 RAISED IN THE 2023 CHALLENGE FOR 77 CHARITIES**

**$12,400 MATCH ON THE FIRST $20,000 RAISED BY EACH PARTICIPATING CHARITY**

**$924,331 TOTAL 2023 MATCH FUND**

**23% INCREASE IN FUNDS RAISED THROUGH THE 2023 CHALLENGE OVER 2022**

**$329,528 WCF COSTS TO HOST THE 2023 CHALLENGE**

---

**TOTAl RAISED**

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

<table>
<thead>
<tr>
<th>Nonprofit Name</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbie Shelter</td>
<td>$172,423</td>
</tr>
<tr>
<td>Amazing Place Music</td>
<td>$56,670</td>
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<tr>
<td>Backpack Assistance Program</td>
<td>$94,013</td>
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<tr>
<td>Big Brothers Big Sisters NW Montana</td>
<td>$47,780</td>
</tr>
<tr>
<td>Bigfork Art and Cultural Center</td>
<td>$52,415</td>
</tr>
<tr>
<td>Bob Marshall Wilderness Foundation</td>
<td>$61,615</td>
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<tr>
<td>Boys &amp; Girls Club of Glacier Country</td>
<td>$59,107</td>
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<tr>
<td>CASA for Kids</td>
<td>$243,885</td>
</tr>
<tr>
<td>Center for Restorative Youth Justice</td>
<td>$139,770</td>
</tr>
<tr>
<td>Child Bridge</td>
<td>$137,030</td>
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<tr>
<td>Children’s House Montessori</td>
<td>$33,880</td>
</tr>
<tr>
<td>Cude Girls United</td>
<td>$98,056</td>
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<tr>
<td>Conrad Mansion Museum</td>
<td>$26,517</td>
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<tr>
<td>Creston Firefighters Association</td>
<td>$35,734</td>
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<tr>
<td>DREAM Adaptive Recreation</td>
<td>$260,421</td>
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<tr>
<td>Flathead Area Mountain Bikers</td>
<td>$49,989</td>
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<tr>
<td>Flathead Audubon Society</td>
<td>$40,200</td>
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<tr>
<td>Flathead County Sheriff’s Posse</td>
<td>$25,659</td>
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<tr>
<td>Flathead Food Bank</td>
<td>$124,743</td>
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<tr>
<td>Flathead Industries</td>
<td>$55,510</td>
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<tr>
<td>Flathead Land Trust</td>
<td>$102,325</td>
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<tr>
<td>Flathead Rapid’s Youth Soccer</td>
<td>$33,230</td>
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<tr>
<td>Flathead Rivers Alliance</td>
<td>$26,191</td>
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<tr>
<td>Flathead Valley Community College Foundation</td>
<td>$75,524</td>
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<tr>
<td>Flathead Valley Ski Education Foundation</td>
<td>$34,295</td>
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<tr>
<td>Flathead Warming Center</td>
<td>$114,199</td>
</tr>
<tr>
<td>Flathead Youth Home</td>
<td>$71,605</td>
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<tr>
<td>Foy’s to Blacktail Trails</td>
<td>$44,980</td>
</tr>
<tr>
<td>Friends of the Flathead Avalanche Center</td>
<td>$45,091</td>
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<tr>
<td>Gateway to Glacier Trails</td>
<td>$44,619</td>
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<tr>
<td>Glacier Hockey Association</td>
<td>$22,980</td>
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<tr>
<td>Glacier Institute</td>
<td>$45,530</td>
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<tr>
<td>Glacier National Park Conservancy</td>
<td>$105,449</td>
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<tr>
<td>Glacier Nordic Club</td>
<td>$59,503</td>
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<tr>
<td>Glacier Skate Academy</td>
<td>$35,025</td>
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<tr>
<td>Glacier Symphony &amp; Chorale</td>
<td>$77,454</td>
</tr>
<tr>
<td>Good Grief Group</td>
<td>$64,270</td>
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<tr>
<td>Habitat for Humanity of Flathead Valley</td>
<td>$63,248</td>
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<tr>
<td>Hockaday Museum of Art</td>
<td>$55,035</td>
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<tr>
<td>Housing Whitefish</td>
<td>$56,850</td>
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<tr>
<td>Humane Society of Northwest Montana</td>
<td>$81,531</td>
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<tr>
<td>Imagin8 Library Foundation</td>
<td>$167,640</td>
</tr>
<tr>
<td>Immanuel Foundation</td>
<td>$38,915</td>
</tr>
<tr>
<td>Kalispell Education Foundation</td>
<td>$50,689</td>
</tr>
<tr>
<td>Land to Hand</td>
<td>$166,700</td>
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<tr>
<td>Lighthouse Christian Home &amp; Services</td>
<td>$97,175</td>
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<tr>
<td>Montana Conservation Corps</td>
<td>$43,795</td>
</tr>
<tr>
<td>Montana Kayak Academy</td>
<td>$27,246</td>
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<tr>
<td>Montana Youth Diabetes Alliance</td>
<td>$30,171</td>
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<td>Nate Chute Foundation</td>
<td>$219,688</td>
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<tr>
<td>North Valley Food Bank</td>
<td>$208,521</td>
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<td>North Valley Music School</td>
<td>$366,962</td>
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<tr>
<td>North West Montana Veterans Food Pantry</td>
<td>$61,170</td>
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<tr>
<td>Northwest Montana Community Land Trust</td>
<td>$59,850</td>
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<tr>
<td>Northwest Montana History Museum</td>
<td>$48,835</td>
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<tr>
<td>Project Whitefish Kids</td>
<td>$79,661</td>
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<tr>
<td>Ravenwood Outdoor Learning Center</td>
<td>$36,335</td>
</tr>
<tr>
<td>Samaritan House</td>
<td>$144,403</td>
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<tr>
<td>Shepherd’s Hand</td>
<td>$76,880</td>
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<tr>
<td>Sparrow’s Nest of NW MT</td>
<td>$154,549</td>
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<tr>
<td>Stumptown Art Studio</td>
<td>$59,410</td>
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<tr>
<td>Tamarack Grief Resource Center</td>
<td>$237,774</td>
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<tr>
<td>The Nurturing Center</td>
<td>$51,558</td>
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<tr>
<td>Two Bear Therapeutic Riding Center</td>
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<tr>
<td>Whitefish Community Center</td>
<td>$56,425</td>
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<tr>
<td>Whitefish Community Foundation</td>
<td>$64,221</td>
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<tr>
<td>Whitefish Dog Park</td>
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<td>Whitefish Firefighters Association</td>
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<tr>
<td>Whitefish Lake Institute</td>
<td>$67,795</td>
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<tr>
<td>Whitefish Legacy Partners</td>
<td>$145,128</td>
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<td>Whitefish Review</td>
<td>$47,985</td>
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<tr>
<td>Whitefish School District Education Foundation</td>
<td>$197,775</td>
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<tr>
<td>Whitefish Theatre Co.</td>
<td>$150,995</td>
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<tr>
<td>Whitefish Veterans Support Team</td>
<td>$60,965</td>
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<tr>
<td>Wings Regional Cancer Support</td>
<td>$34,045</td>
</tr>
</tbody>
</table>

WCF | Annual Report 2023
SPECIAL AWARD WINNERS

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

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

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

RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD $2,500
BIG MOUNTAIN FIREFIGHTERS ASSOCIATION received the Russ and Mary Jane Street Community Service Award and an accompanying $2,500 grant for the organization’s efforts to purchase equipment and other necessary items for the Big Mountain Fire District.

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

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

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

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

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

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

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

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

41
NUMBER OF NONPROFITS RECEIVING A COMMUNITY GRANT IN 2023

$270,701
COMMUNITY GRANTS AWARDED IN 2023

$2.7M
COMMUNITY GRANTS AWARDED SINCE 2000

2023 COMMUNITY GRANT AWARDS

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

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

$120,000 AWARDED IN 2023

$854,000 AWARDED FROM 2010-2023

2023 MAJOR COMMUNITY PROJECT GRANTS

$50,000 AWARDED TO THE GLACIER INSTITUTE

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

$20,000 AWARDED TO WHITEFISH SKATEPARK ASSOCIATION

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

$50,000 AWARDED TO FLATHEAD AUDUBON SOCIETY

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

MICRO GRANT PROGRAM

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

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

EMERGENCY RESPONSE GRANT PROGRAM

Whitefish Community Foundation’s Emergency Response Grant Program provides flexible resources for nonprofits facing an unexpected emergency. These grants may be deployed rapidly to support nonprofits during a recognized emergency or disaster in the Flathead Valley, or they may be utilized to fund projects or repairs that must be addressed immediately in order to keep a local nonprofit operating. In 2023, the Foundation awarded a $10,000 Emergency Response Grant to North Valley Food Bank when the organization’s refrigerated truck needed costly repairs.
Early in 2020, Whitefish philanthropists Sherry and Dave Lesar issued a challenge from the Lesar Family Foundation to raise funding to support impactful programs for Flathead Valley children who are homeless or at risk of becoming homeless. In response, Whitefish Community Foundation created the Kids Fund to support programs in the areas of housing, health and mental wellness, safety, food access, and education that mitigate the challenges faced by these youth and their families.

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

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

**KIDS FUND**

**GIVING VOICE TO CHILDREN**

**2023 KIDS FUND GRANTS**

$125,000

KIDS FUND GRANTS IN 2023

$391,000

KIDS FUND GRANTS FROM 2020-2023

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

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

$45,000 AWARDED TO CENTER FOR RESTORATIVE YOUTH JUSTICE

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

$30,000 TO NATE CHUTE FOUNDATION

To empower a peer-to-peer mental health support consortium of high school students, and expand middle school classroom mental wellness and suicide prevention programs throughout the Flathead Valley.
Whitefish Community Foundation offers free professional development, capacity building, and networking opportunities for nonprofit staff and board members through the Nonprofit Development Program (NpDP). Over the years, NpDP has helped many Flathead Valley organizations improve oversight, transparency, fiscal responsibility, and other key areas of nonprofit governance and management.

**2023 NONPROFIT WORKSHOPS**

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

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

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

**BUILDING ENDOWMENTS FOR NONPROFIT SUSTAINABILITY**

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

<table>
<thead>
<tr>
<th>NONPROFIT ENDOWMENTS HELD BY WCF</th>
<th>MONTANA HISTORY &amp; CIVICS EDUCATION FOUNDATION ENDOWMENT (NEW)</th>
</tr>
</thead>
<tbody>
<tr>
<td>$18M TOTAL ENDOWMENT ASSETS</td>
<td>NATE CHUTE FOUNDATION ENDOWMENT</td>
</tr>
<tr>
<td>$400,798 DISTRIBUTIONS TO NONPROFITS IN 2023</td>
<td>NORTH VALLEY FOOD BANK ENDOWMENT</td>
</tr>
<tr>
<td>$3.5M DISTRIBUTIONS TO NONPROFITS SINCE 2014</td>
<td>NORTH VALLEY MUSIC SCHOOL YOUTH SCHOLARSHIP ENDOWMENT</td>
</tr>
</tbody>
</table>

**GLOBER SYMPHONY, ORCHESTRA & CHORALE** has been a cultural beacon in the Flathead Valley since 1982, providing musicians, audiences, and students with musical experiences that inspire and educate. In 2009, Glacier Symphony, Orchestra & Chorale established a permanent endowment fund at Whitefish Community Foundation with a modest initial donation of just over $7,000. Over the past 15 years, between fundraising and investing, their fund has grown to $150,000 while also providing annual distributions totaling over $44,000 to help support their programs and operations.
Richard and Suzanne Hildner’s combined history of community involvement in the Flathead Valley is astonishing. From practicing medicine to teaching high school students, the Hildners have devoted their lives to helping others.

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

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

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

The Montana Endowment Tax Credit (METC) helps build nonprofit endowment funds by allowing donors to pay less in Montana state income taxes when they make a planned gift to a qualified Montana charitable endowment, such as any of the 43 endowment funds held by Whitefish Community Foundation. In 2023, 17 donors saved approximately $270,000 in Montana state income taxes by investing $680,000 in nonprofit endowment funds held by Whitefish Community Foundation. Since inception in 2012, a total of $3.2M has been raised for nonprofit endowments through the METC program at WCF.

“Together we grow”

Richard & Suzanne Hildner

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

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

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

“These tax credit gifts really put your money to work,” Richard said.

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

“We are part of the Flathead Valley, and it’s part of us,” Richard said. “We shop locally, and we also invest in our community locally at Whitefish Community Foundation.”
LEGACY SOCIETY

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

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

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

*Deceased

Types of Funds

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Susan and John Witt

*Deceased

Types of Funds

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.

Types of Funds

Endowment Funds

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

Designated Funds

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

Donor Advised Funds

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

Agency Funds

Agency Funds are established by a charity to provide income streams to support programs and operations.

Scholarship Funds

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

The primary difference between endowed and non-endowed funds is the permanency.

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

Non-Endowed Funds are not subject to a spending policy. Donors can grant as much of the fund as they wish during the year. Non-endowed funds can be invested to increase a donor’s giving potential over a period of time.
A Donor Advised Fund (DAF) is a charitable giving tool designed to help families and individuals give, grow, and grant to support their favorite nonprofits.

**HOW DOES A DONOR ADVISED FUND WORK?**

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

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

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

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

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**DONOR ADVISED FUNDS**

**WHAT IS A DONOR ADVISED FUND?**

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

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

With roots in the Flathead Valley, the AGL Foundation opened a Donor Advised Fund (DAF) at Whitefish Community Foundation in 2012. Adelyn’s granddaughter Monica Pastor is among the new generation of philanthropic leaders in the Gordon family who serve as fund advisors for the AGL Foundation’s DAF. Raised in Bigfork and now a small business owner in Whitefish, Monica is deeply invested in the success of local nonprofits.

“Having a DAF at Whitefish Community Foundation allows our private foundation to satisfy IRS distribution requirements and, more importantly, allows our family to invest in our local community,” Monica said.

Whitefish Community Foundation makes granting easy for DAF holders and vets nonprofits to ensure they are in good standing with the IRS. “We rely on the Community Foundation’s expertise and knowledge about the local charitable climate,” Monica said. “There is no better way to get access to meaningful impact and tap into a huge local knowledge base than to work with Whitefish Community Foundation.”
Whitefish Community Foundation is pleased to work with businesses and families to establish scholarships that help young adults reach their educational goals. The Foundation professionally manages all aspects of the process from start to finish. We help donors develop eligibility criteria for their scholarship, guide students through the application process, and invest the funds to preserve value and foster growth.

**ACTIVE SCHOLARSHIP FUNDS:**
- Dorothy and Luther Campbell Scholarship
- Glacier Restaurant Group–R.I.S.E. Scholarship
- Jean Atkinson Driggers Scholarship
- Kiita Foundation Scholarship
- Montana Coffee Traders Scholarship

10 **STUDENTS RECEIVED SCHOLARSHIPS IN 2023**

$15,000 **AWARDED IN 2023**

Jim and Jo-Ann Armstrong, Scholarship Donors, Circle of Giving Members

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

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

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

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

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

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

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

WHITEFISH MOUNTAIN RESORT

$1.5M
RAISED TO BENEFIT LOCAL NONPROFITS SINCE FUND INCEPTION IN 2002

$32,474
SUPPORTED FLATHEAD VALLEY 5TH GRADE SKI PASS PROGRAM AND DREAM ADAPTIVE RECREATION’S WINTER PROGRAMS DURING 2022-23 SEASON

$102,524
SUPPORTED LOCAL NONPROFITS IN 2023

58
NUMBER OF GRANTS AWARDED TO LOCAL NONPROFITS IN 2023

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

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

WHITEFISH LAKE GOLF CLUB

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

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

COMPOSITION OF ASSETS
2023 YEAR END

As of December 31

<table>
<thead>
<tr>
<th></th>
<th>2023</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets</td>
<td>$61,445,000</td>
<td>$51,424,000</td>
</tr>
<tr>
<td>Total Contributions</td>
<td>$17,925,000</td>
<td>$13,145,000</td>
</tr>
<tr>
<td>Total Grant Distributions</td>
<td>$13,745,000</td>
<td>$11,167,000</td>
</tr>
</tbody>
</table>

GROWTH IN GRANTING

FINANCIAL STEWARDSHIP

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

INVESTMENT COMMITTEE
G. Stacy Smith, Chair
John Collins
Brendan Craig
Greg Garrison
Hank Ricklefs
Jamie Shennan
Ken Wessels
Ardy Whisler
John Witt

FINANCIAL MANAGERS DISCLOSURE

Investment Manager:
Mason Investment Advisory Services

Custodian: Pershing, LLC
CPA: Sallie Brown, JCCS, CPAs, PC, Whitefish
Auditor: Tony Vannoy, JCCS, CPAs, PC, Kalispell

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

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

INVESTMENT RETURNS
(ANNUALIZED & NET OF FEES)

<table>
<thead>
<tr>
<th></th>
<th>1-YR</th>
<th>3-YR</th>
<th>5-YR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-Term Growth</td>
<td>14.80%</td>
<td>6.24%</td>
<td>9.70%</td>
</tr>
<tr>
<td>Balanced</td>
<td>11.36%</td>
<td>3.96%</td>
<td>7.03%</td>
</tr>
<tr>
<td>Capital Preservation</td>
<td>4.63%</td>
<td>1.90%</td>
<td>1.71%</td>
</tr>
</tbody>
</table>

GRANT DISTRIBUTIONS BY FUND TYPE

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

TOTAL ASSETS BY FUND TYPE

- Advised, 53%
- Endowed, 29%
- Designated, 9%
- Annuity, 5%
- WCF Grants, 5%
- Operating, 3%

BALANCED POOL ALLOCATION

- 52% Equity
- 47% Cash
- 1% Fixed Income

LONG-TERM GROWTH ALLOCATION

- 77% Equity
- 22% Cash
- 1% Fixed Income

HIGHLIGHTS

1,967 NUMBER OF GRANTS AWARDED

475 NUMBER OF NONPROFIT RECIPIENTS

$6,987 AVERAGE GRANT AMOUNT

$28,936 AVERAGE PER NONPROFIT
THANK YOU, 2023 DONORS!

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

**Grady, Dave and Linda Engh-Grady**
**Grant, Cindy**
**Grants, Peter and Colleen**
**Grantor, Frank**
**Grateful Iris Glass**
**Graves, John and Sarah**
**Gray, Sandy and Cameron Blake**
**Great Northern Bar**
**Great Than Image, LLC**
**Green, Ken and Jeanie**
**Greenway, Taylor**
**Gregory, Joe and Cindy**
**Groshong, James and Michele**
**Groth, Bribe and Greek**
**Gwatney, Christopher and Jill**
**Hackathorn, Casey and Tina Barrett**
**Hackart, Molly**
**Hadidi, Cyrus and Michelle**
**Hayak, John and Jex**
**Hagg, John and Kristin**
**Hall, Jake and Sam**
**Hall-Halliburton Foundation**
**Hammer Nutrition**
**Hanna, William and Phylis**
**Hanson, Jason and Stefanie**
**Harding, Tom and Sue**
**Harman, Fred and Stephanie**
**Harvis Financial Services**
**Harris, Evan and Sadie**
**Harriss, Jack and Willy**
**Harry, Scott and Ellis**
**Hawthorn, Scott and Melissa Sleade**
**Haycox, Brian and Shannon**
**Hayes, Bob and Patty**
**Heinrich, Klaus and Joaquina**
**Heinig, Dennis and McMillan**
**Henderson, Grant and Jill**
**Hermes, Bob and Carol**
**Hess, Peter and Cynthia**
**Hicks, Doug and Lissa**
**Hidden Moose Lodge**
**Hildner, Richard and Suzanne**
**Hines, Rodderick and Doreen**
**Holden, Russ and Linda**
**Hollenstein, Jon**
**Holto, Tom and Dorothy Drum**
**Holloway, Matt and Corrie**
**Hosey, Dusty**
**Howard, Steve and Jodi**
**Howard, Trevor and Cary**
**Hust, Will and Leslie**
**Hyer, Jeff**
**Iba, Donald Fund**
**Iron Horse Foundation**
**Irvine Golf Club**
**Iverson, Carley**
**Jackson, Marcie**
**Jacobs, Marco**
**Jacobson, David and Janice**
**Jameis A. Reep Family Foundation**
**Janis, Scott and Barb**
**Jarendit, Ralph and Linda**
**JCCPAs**
**Jensen, Jeff and Lou Ann**
**Jenson, Mike and Barbara**
**Jeremiah, Paul and Ann**
**Johannsen, Todd**
**Johannsen, Tracy**
**Johnson, Grant**
**Johnson, Judy**
**Johnston, Paul**
**Jones, Bill and Ann**
**Jones, Jonny and Brenda**
**Jonas, Richard and Mary Shuttle**
**Joranson, Megan**
**Karlsen, Kim and Mike**
**Kelton, Rachel**
**Kgee AM 600 FM 96.5**
**King, John and Mary**
**Kinslow, Rick and Sybil**
**Kirch, Philip and Leslia**
**Kniveton, Burket and Clare**
**Knox, Steve**
**Kole, Joe and Tracy**
**Kraft, Rich and Catherine**
**Kramer, John and Jon McBride**
**Kubik, Ross and Sadie**
**Kurtz, Jon and Jessa**
**Kushkin, marsh and Julie Williams**
**Lacey, John and Dana**
**LaChance, Tom and Cindy**
**Lamb, Paul and Yvonne**
**Lane, Thomas and Ann**
**Lasentz, Susan and Dave**
**LaRocca, Lindsay**
**Latimer, Jay and Mignon**
**Latimer, Nan**
**Lauman, Michael and Wendy**
**LeBeauch, Jeanette**
**Leiser, Pat**
**Leistiko, Fred and Connie**
**Lesar, Dave and Sherry**
**Levit, Stuart and Nena**
**Lewis, Allison and Carin Pellet**
**Lightbody, Carol**
**Lilford, Sydney and Karen Persar**
**Litchfield, Marsha**
**Lockhart, Fred and Marjory McClaren**
**Lofland, Sarah and Robert**
**Lohmeyer, Dian and David**
**Loosemore, Cheryl**
**Lucey, Kathy**
**Ludlau, Joe and Linda**
**Luecke, Mary**
**Luntz, Mark and Sandy**
**Lusky, Dave and Cindy**
**Lutes, Duncan and Deb**
**Maciwal, Bar and Gayle**
**Maazlott, Charlie and Linda**
**Magazine Founders Alliance**
**Malnak, Dennis and Anne**
**Malone, Edwina and Dolan**
**Malone, Joe and Tracy**
**Marlowe, Jack and Suzanne**
**Marren, Bob and Barbara**
**Marx, Anne**
**Mason, Charley**
**Mayo, Jim**
**McCabe, Murray and Libby**
**McCarale, Paul and Annie**
**McClure,组 Chris and Annie Lette**
**McCroy, Abe and Shelley**
**McGraw, Adam**
**McGavin, Allan and Valerie**
**McIntyre, Curt and Sherry**
**McKinney, Jon**
**Meade, Jessica**
**Mechanek and JeanAnne Swopes**
**Meidier, James**
**Meili, Mark and Mary Jo**
**Meislk, Jerry and Rhona**
**Mentor, Larry and Ruth**
**Mertl, Scott and Amanda**
**Messick, Mike and Melinda**
**Milorsi, Kelly and Melissa**
**Milten, Ben and Meeta**
**Miller, Brian and Heidi**
**Miller, Judy and Katie**
**Miller, Lori**
**Miller, Nicosie**
**Miller, Ron and Jean**
**Minchew, Randy and Teresa**
**Montaball, Patrick**
**Montana Coffee Traders**
**Montgomery, Dave and Emily**
**Montoyo, Betty**
**Moody, Karl and Carol**
**Moore, Emie and Maureen Cleary**
**Morgan, Matt and Ellen**
**Moran, Thomas and Nancy**
**Morris, Barbara**
**Morton, Ted**
**Moss, Christine**
**Nelson, Linda**
**Nelson, Douglas and Barbara**
**Nelson, Leif and Gloria**
**Nelson, Rick and Manly**
**Newton, Doug and Amy**
**Nigh, Robert**
**Nicolson, Grahame and Kary**
**Niesz, Katie**
**Nipto, Tom and Terrie**
**NORTHWEST imaging**
**O’Brian, Kevin and Leslie**
**O’Callaghan, Bob and Cindy**
**Oleson, Doug and Beverly**
**O’Neil, Mario**
**O’Malley, Linda and Pam**
**Origlanna, TC and Claudine**

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**IN MEMORIAM**

**DAVE STEWART (1939-2023)**  
Founder, Board member 2000-2008,  

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

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

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

Dave continues to make a difference in our community with his legacy gift. In 2005, he named Whitefish Community Foundation’s Permanent Endowment Fund to receive a portion of his estate. This gift will benefit our organization for generations to come. Every effort is made to correctly list and thank each donor who allows us to make a public acknowledgment of their gifts to Whitefish Community Foundation. If your name is missing or incorrect, we apologize for our error. Please contact us with corrections at (406) 863-1781 or contact@whitefishcommunityfoundation.org. Thank you.

**IN KIND DONORS:**  
Bighorn Eagle  
Bonsai Brewing Project  
Buffalo Café  
Daily Inter Lake  
First Interstate Bank  
Flathead Valley Community College  
Flowerscapes  
Grouse Mountain Lodge  
Hungry Horse News  
Iron Horse Golf Club  
KGE2 AM 600 and FM 16.5  
Lori Miller Law  
Summit Beverage  
Trovare  
The Homestead  
The Wave Aquatic & Fitness Center  
Wachholz College Center  
Whitefish Lake Golf Club  
Whitefish Lake Restaurant  
Whitefish Mountain Resort  
Whitefish Pilot  
Whitefish Theatre Co.  
Whitefish Westside Market

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

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

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WHITEFISH COMMUNITY FOUNDATION
BOARD OF DIRECTORS

OUR TEAM

Alan Davis  President/CEO
Daria Perez  Chief Financial Officer
Liz Scholten  Associate Director of Finance
Lynnette Donaldson  Director of Programs and Grants
Jill Seigmund  Director of Marketing and Communications

PAST BOARD CHAIRS:
Mike Jenson  2000–2004
Dave Stewart  2005–2007
Paul Johannsen  2008–2010
Carol Atkinson  2011–2013
David Dittman  2014–2016
Ken Wessels  2017–2018
Linda Maetzold  2019–2021
Ardy Whisler  2022–2023

GIVING TOGETHER

Thank you, outgoing board members!

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.