

giving together

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

Whitefish Community Foundation Awards a Major Community Grant

It has been an exciting year at the Whitefish Community Foundation with new levels of giving being reached thanks to you, our donors. This year, the Kramer Family Fund challenged the Community Foundation to create an annual grant for "Major Community Projects." The Foundation met this challenge and awarded the first grant to the Whitefish High School gymnasium renovation project as part of their Quality Schools challenge grant campaign.

The High School Project was a perfect fit for what the program is designed to do: make an impact on a capital project which has significant fundraising underway and will greatly benefit our community.

Seven organizations requested application to the new grant program this year and four projects were selected to submit an application. This new program established that there are many worthy projects and campaigns on the horizon. We hope to grow this program to meet the increasing needs of our community.

Funding for the Major Grants Program comes from interest from the Foundation's Endowment Fund, a donation from the Kramer Family Fund and donations from community minded people like you.

To find out more about the Whitefish Community Foundation, how you can become involved and give back to your community, contact Linda at 406-863-1781 or email linda@whitefishcommunityfoundation.org.



Photo credit: Matt Baldwin—Whitefish Pilot

Whitefish Community Foundation presented a \$20,000 check from the Major Community Projects Fund to the Whitefish High School gymnasium renovation project during half time of the 2011 Homecoming football game.

Pictured above from right to left: Bayard Dominick, Chris Kelsey, Dave Carlson, Kate Orozco and Carol Atkinson.

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Annual Community Grant Program Awards over \$110,000 in 2011

It is thanks to the incredible community we live in that the Whitefish Community Foundation was able to award more than \$110,000 from the Community Grants Fund. But, while this reaches a new level of giving for the Foundation, there is still much to do. This year, 68 organizations applied for funding and 46 were awarded grants. Over \$336,000 in funding was requested. This is a record amount of requests and another record amount in giving for the Foundation.

Funding for the Community Grants Fund comes from private donations, the annual Whitefish Duck Derby that raised \$45,000 for grants this year, the Summer Art Social and interest from the Foundation's Permanent Endowment Fund.

At the annual awards ceremony, additional grant awards came from donor-advised "giving funds" held at the Foundation by individuals and businesses. The Foundation holds 16 donor-advised funds and 16 agency funds and agency endowment funds that benefit local nonprofits. **Between the Foundation's grant program and another \$193,300 from our donor-advised funds, over \$300,000 was distributed at the 2011 Awards Presentation, a 20% increase over last year.**

In total, 137 grants were awarded to 75 different nonprofit organizations. Organizations are either Whitefish based organizations or provide a service to the Whitefish Community.

See full grant report on page 3.



Photo credit: Ardyce Whisler

Members of the Glacier Nordic Board receive the 2011 Doris Schumm Community Spirit Award.

Pictured above from left to right: Carol Atkinson, Surrey Schumm, Ellie Johnson, Robin Brooks, Cameron Blake and Marc Venery.



Photo credit: Ardyce Whisler

▲ The 2011 Great Fish Award was presented to Connie Heckathorn, Joey Kositzky and the Whitefish Community Library.

New this year, the annual award came with a \$1,000 grant to the receiving organization. The Great Fish Award recognizes the value and service a local nonprofit, its director and staff provide to the community. The Whitefish Community Library provides an invaluable service to our community by offering a high quality space for locals to read, study, receive tutoring, access computers, information and the internet and check out books. Congratulations Whitefish Community Library and thank you for all you do for Whitefish!

◀ Glacier Nordic Club is presented with the 2011 Doris Schumm Community Spirit Award

and a special \$1000 grant. Board President Carol Atkinson and Dorie's daughter Surrey Schumm presented the award to members of the Glacier Nordic Club Board. Glacier Nordic Club, which maintains and grooms the Glacier Nordic Center at the Whitefish Lake Golf Club during the winter, received several grants from the Foundation to help with the grooming, lighting, equipment needs and the junior ski program.



**Doris Schumm
(1937-2009)**

"Glacier Nordic Club is a great choice and a perfect fit to represent my mom's spirit and active lifestyle," said **Surrey Schumm**. Doris Schumm served on the Foundation's Board of Directors and Grants Committee for over eight years and left a significant bequest to the Foundation's Endowment Fund that will benefit the Whitefish community for years to come.

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WHITEFISH COMMUNITY FOUNDATION COMMUNITY GRANTS FUND PROUDLY SUPPORTING:

HEALTH AND HUMAN SERVICES:

- Community Action Partnership of NW Montana: Aid for Project Homeless Connect
- Flathead CARE: Scholarships for Whitefish Campers
- Flathead Youth Home: Sponsor Out & In Program Activity
- Human Therapy on Horseback: Financial Assistance to Individuals with Disabilities
- Literacy Volunteers of Flathead County: Books for Whitefish Reading Program
- NC Foundation: Student Assistance Program for Mental Health K-12
- North Valley Food Bank: Food Supplies, School Supplies, Sit Down Supper Program
- Samaritan House: Provide Tele-medical Services for Patients to Speak with Doctors
- Shepherd's Hand Free Clinic: Implement Chronic Care Program
- Tamarack Grief: Stabilize and Grow Grief Support
- Violence Free Crisis Line: Provide Services to Children Who Witness Abuse
- WAVE-Whitefish Aquatic and Health Center: Funding for a Pool Lift and Scholarships
- Whitefish CARE: Mentoring Program
- Whitefish Community Center: New Refrigerator for "Meals on Wheels" and Events
- Whitefish Rotary Charitable Fund: Provide Christmas Gifts for Underprivileged Children
- Whitefish Shines!: Funding for Downtown Whitefish Christmas Lighting

EDUCATION:

- Children's House Montessori School: Scholarship Funding
- Olney-Bissell School District #58: Five Netpad Computers
- Whitefish Community School: New Refrigerator
- Whitefish High School Science Department: Twelve Advanced Compound Microscopes
- Whitefish Library Association: Rebuild Library Collection
- Whitefish Middle School/High School Music Department: Specialists for Group Lessons
- Whitefish School District: Quality Schools Matching Grant for Gymnasium Renovation
- Whitefish School District Band Program: Two Timpani (23" and 32")

ARTS AND CULTURE:

- Alpine Theatre Project: Two Headsets
- Glacier Symphony and Chorale: Produce and Present Festival Amadeus
- Hockaday Museum of Art: Museum on the Move Program in Whitefish Schools
- North Valley Music School: New Windows in Building Upstairs
- Stumptown Art Studio: Funding for Youth Art Program
- Whitefish Review: Whitefish Community Literary Event
- Whitefish Theatre Company: Outreach to School Children, Seniors and Special Needs

RECREATION:

- DREAM Adaptive Recreation: Equipment Acquisition
- Glacier Nordic Club: Ski-Doo Skandic V-800 Snowmobile/Snow Tires & Tune-up for Van
- Glacier Twins American Legion Baseball: Funding toward New Bus
- Great Northern Veteran's Peace Park: Gate, New Signs, Perimeter Fencing
- Project Whitefish Kids: Funding for Lawn Mower
- Whitefish 7th and 8th Grade Football: Funding for a Five Man Oklahoma Blocking Chute
- Whitefish Figure Skating Club: Funding for Holiday Ice Show
- Whitefish Youth Soccer Association: New Nets, Field Painting Equipment & Jr. Program

ENVIRONMENT:

- Family Forestry Expo: Workbooks for Expo Field Day
- Flathead Audubon Society: Expand Conservation Education Program in Whitefish
- Whitefish Community Garden: Funding for Electricity Installation
- Whitefish Lake Institute: Funding toward Hydrolab DS5 Multiprobe Sonde

ANIMAL AND WILDLIFE:

- Flathead Spay and Neuter Task Force: New Surgical Packs
- Humane Society of NW Montana: IQAir HealthPro Plus Air Purifier
- WAG-Whitefish Animal Group: Sod Placement, Obstacle Course, Asphalt Pathway

WHITEFISH COMMUNITY FOUNDATION ADVISORY COUNCIL GRANTS:

- Flathead Land Trust: Promotional Materials and an iPad for Conservation Outreach
- Whitefish CARE: Holiday Food Bag Program for Children in Need
- Whitefish School District Learning Garden: Funding for Greenhouse Development
- Heart Of Whitefish: To Promote the SNAPS Program for Locally Grown Food

HIGHLIGHTS FROM THE 2011 GRANT AWARDS EVENT

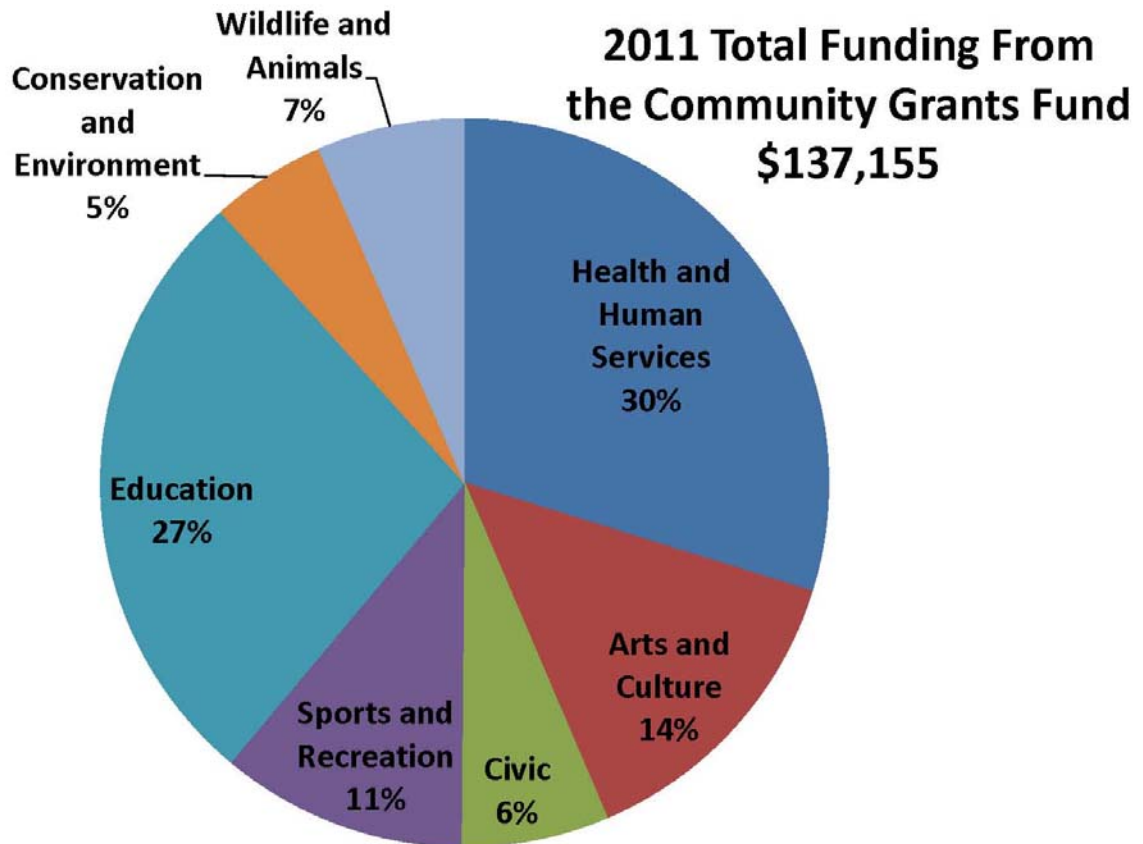


Whitefish Mountain Resort CEO Dan Graves presents a grant from the Whitefish Mountain Resort Fund to Doug Betters for Whitefish Winter Classic—For the Children. Doug Betters Founded the Whitefish Winter Classic in 1984. ▼



▲ The Whitefish High School Jazz and Drum Line performed for the 2011 Grant Awards Reception. Special thanks to Mark McCrady and his jazz and drum line students for their support and participation.

▲ Executive Director Linda Engh-Grady presents the coveted Golden Duck Award to John Witt at the 2011 Grant Awards Event for selling the most "Big Ducks." The Whitefish Duck Derby raised \$45,000 for the Community Grants Fund.



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2011 Duck Derby Raises \$45,000

The third annual Whitefish Duck Derby was held August 14th on a beautiful sunny day on the Whitefish River. Almost 2000 ducks raced down the river in the three races where 25 individuals earned prizes. The Grand Prize was a one week stay in a fully furnished condo in Mauna Lani, Hawaii with \$1,000 in airline vouchers and \$1,000 spending cash! Mike and Patricia Frost won the grand prize Hawaii vacation. Molly Hobgood won the Apple iPad2 sponsored by Best Buy and First Interstate Bank in the Lucky Duck Race. Tamlin won the Nikon camera donated by Costco in the Kid's Great Rubber Duck Dash. The Foundation raised over \$45,000 by adopting out rubber ducks to donors.

The First Place grant of \$1,000 for the organization with the most points in the nonprofit referrals went to Shepherd's Hand Free Clinic. Second place of \$500 went to the North Valley Food Bank and third place of \$250 went to Glacier Symphony and Chorale. The winners of the Big Duck Race also helped the Whitefish Area Fire Safe Council win a \$1000 instant grant by referring their duck adoption to the organization.

Community Foundation Board members worked hard adopting out ducks to make the event a great success. John Witt and his WittCo Stables earned the coveted "Golden Duck Award" by selling 96 Big Ducks. Carol Atkinson was second with 66 and Jay Latimer was third with 27. "We have a great Board of Directors and that's what makes this event such a success!" said Director Linda Engh-Grady.

Major thanks to all who supported the 3rd Annual Duck Derby by adopting ducks and helping the Grants Fund award over \$110,000 in grants to area nonprofits.



Photos (clockwise starting with upper left) 1. BBQ Fun with Barb Jenson and Mignon Latimer; 2. Wranglers working hard to keep the ducks in a row 3. Duck auditor Sallie Foley having a good time auditing ducks; 4. Mari Ryan accepts her 9th place prize!

Thank you for making the 3rd Annual Whitefish Duck Derby a great success. It raised 30% more funds than in 2010. Please thank the following individuals and businesses who care about the Whitefish community:

Title Sponsors:

**ALPINE VILLAGE CENTRE
MCGARRY'S ROADHOUSE**

Event Sponsors:

Carol and Richard Atkinson
Best Buy
Big Valley Radio
Buffalo Café
Ciao Mambo Italian Restaurant
Copperleaf Chocolate Company
Costco Wholesale
Craggy Range Bar and Grill
Kevin Duff
First Interstate Bank
Glacier Symphony and Chorale
Great Northern Brewing Company
Great Northern Ventures
JCCS, CPA
Latitude 48
Mackenzie River Pizza
Markus Foods and Wine Shop
McGarry's Roadhouse
Montana Raft and Glacier Guides
Mountain Cinemas
Pin and Cue
Torie Powell
Red Caboose
Doug Reed
Scout Troop #17
Sportsman Ski Haus
Stumptown Art Studio
Sweet Peaks
Wasabi Sushi Bar and Ginger Grill
Whitefish Lake Golf Club
Whitefish Lake Restaurant
Whitefish Mountain Resort
Whitefish Pilot
Whitefish Theatre Company

**And special thanks to Glacier Bank,
the Kids Carnival Helpers,
Duck Wranglers,
Monica Pastor, Richard Gordon and
Cheryl Watkins, Whitefish Community
Foundation Advisory Council
Whitefish Community Foundation
Board of Directors**

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OPEN A CHARITABLE GIVING FUND

A Giving Fund is a donor-advised fund designed to make charitable giving easier for you. It offers you the maximum tax advantages of all other charitable giving options, provides you with more choices and a simplified giving process.

Why open a Giving Fund?

A Giving Fund provides the donor(s) with a number of benefits while directing donations to charity including:

- *Ability to accept and process appreciated securities of which the donor does not have to pay capital gains tax*
- *Capacity to receive one block of securities benefiting multiple charities*
- *Creation of a legacy versus providing a one time gift*
- *Separation of tax planning and charitable giving: the donor receives tax deduction when contribution is made, but grants to charity can be made over an extended period of time*
- *Simplicity: A single contribution can benefit multiple charities while requiring only one tax substantiation letter*

Advantages of a Giving Fund:

- *Low entry cost for participating in strategic charitable giving*
- *Personalization through naming of the giving fund*
- *Ability to receive advice on charitable giving in your community*
- *Flexibility over the timing and notification of grant distributions*
- *Choice of anonymity or recognition in grant-making*
- *Flexibility to name successor advisors for the giving fund*
- *Create a family legacy by involving the next generation*
- *Tax-free growth of charitable assets*
- *Ability to budget your giving over an extended period of time*

Any way you wish to give.
Any cause you wish to support.

The Whitefish Community
Foundation can help you do it.

You can leave a legacy.

You can make a difference.

Call us at (406) 863-1781.

Let's change things for the better...

together.

Contact Linda Engh-Grady for
questions regarding a Giving Fund
with the Whitefish Community
Foundation 406-863-1781 or stop
in the office at 214 W 2nd Street.

www.whitefishcommunityfoundation.org

linda@whitefishcommunityfoundation.org

Montana Charitable Endowment Tax Credit

What is it?

The Montana Qualified Endowment Tax Credit allows donors to pay less in Montana state income taxes when they give a qualifying planned gift to a qualified Montana charitable endowment like the Whitefish Community Foundation's permanent endowment fund.

Individual/Estate Incentive:

Individuals who make a **planned gift** to a qualified Montana endowment fund will receive a **tax credit** of 40% of their gift, with a maximum credit of \$10,000 (\$20,000 for joint filers).

Business/Corporation Incentive:

Businesses and corporations that make a direct gift to a qualified Montana endowment fund will receive a tax credit of 20% of their gift, with a maximum credit of \$10,000.

*For example, if your business is in the 34% federal tax bracket and you make a direct gift of \$20,000 to the Whitefish Community Foundation Endowment Fund, your business can take an automatic \$4,000 Montana Tax Credit right off your Montana tax bill and receive a tax deduction of \$6,800 off your federal tax bill.

Contact your financial advisor to see if the Montana Endowment Tax Credit is right for you.

Contact the Whitefish Community Foundation to make a direct gift or a planned gift to a qualified Montana endowment fund at 406-863-1781.

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