Whether it is to the Missoula Community Foundation, the Missoula YMCA, the Carousel, Five Valleys Land Trust, or the Missoula Children’s Theatre, Dale Woolhiser embodies the word “giver.” Dale and his wife, Nancy Thompson, understand that true philanthropists always donate more than money. They give their time, their skills and yes, their dollars to the organizations that make Missoula a great place to live. And they help others give to what they love about Montana.

Dale said the value of a community foundation first became clear to him when he was in high school. “I lost the state wrestling championship twice,” he admitted. “I was a bad person two or three months after the second big loss. My grandmother said ‘A girl from Plevna won the state beef cook-off’ and my father replied, ‘You can’t compare it to a wrestling championship.’ And the bells and the lights and the whistles went off for me because you can compare it. Everyone’s deal is their deal and it’s important to them, and the community foundation concept really helps people benefit the causes of their choice.”

Dale has been involved in Montana’s growing community foundation field since 2000, when he served as the first President of the newly-minted Missoula Community Foundation. To celebrate the millennium, the Missoula business community pooled their ideas, talents and money to create a permanent gift for Missoula. The result was the Missoula Community Foundation, which to date has accumulated over $10 million in assets for the benefit of Western Montana. The Missoula Community Foundation has funded small community projects across Missoula, including equipment for

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Message from the President

Community Matters

One of the biggest program areas for the Foundation is supporting the growth of community foundations in Montana cities and counties. We began this work in 1994 because the board of directors realized that providing an unrestricted financial resource to communities would help them respond to changing needs and opportunities—all to keep them places where people want to raise their family, work, and play.

This has been successful work. The Foundation’s local community foundation family has grown to 45 and as a result we have stronger local nonprofits, new streetscapes, parks and trails, and community-wide collaborations addressing current needs.

In addition to helping with fund raising, planned giving, and strategic grant making we see our role expanding to provide training in and examples of community leadership. With the help of board member Dan Clark, Director of the Local Government Center at Montana State Extension, we came up with the idea of bringing together a local community foundation leader, local elected official, and local extension agent from three communities to attend Community Matters 2010. Each of the communities participated in the Northwest Area Foundation’s Horizons program, so they had training in community leadership. We knew the three community members knew each other well, but might not have spent time thinking about how to use their individual skills and unique positions to work in new ways to address community issues.

This conference was sponsored by the Orton Family Foundation to, “steer change, engage citizens and build strong, vibrant communities from the ground up.”

We came to know the Orton Family Foundation earlier in this year and its work to help communities choose their future resonated with our belief that our local community foundations could be the organizations that help their communities envision and direct that choice. The conference was a place for local
leaders to hear stories about changes other communities have made by encouraging greater civic engagement, using technology to bring people together, and engaging in new models of governance.

It worked! Each community group went home with ideas of how to work together on some really big issues like what to do with an underutilized hospital and the need for assisted living. And how to prepare a community for a new state facility that will bring in new people and place new demands on infrastructure.

We face challenging times in Montana—an aging population, deteriorating community infrastructure, and fewer public resources to keep things glued together. It’s the perfect time for citizens to be more engaged in choosing a future for themselves and coming generations. We think the leadership in our local community foundations is correctly positioned to bring their communities together to successfully meet those challenges.

If you live in a community with a local community foundation, think about making a contribution to support the work it does.

Linda E. Reed
President/CEO

Thanks for supporting I-164!

Thanks to your support, I-164 passed with a tremendous majority on Election Day. Voters overwhelmingly agreed that 400% is too high. I-164 received more than 70% of the vote, with a majority in every single county across Montana. I-164 is a long-awaited victory for Montana’s working families and seniors. We’d like to thank all the donors, volunteers and our coalition partners for supporting the campaign.
community gardens, purchasing park benches, and maintaining the State Veteran’s Memorial in Missoula’s Memorial Rose Garden.

The community foundation sponsors the Missoula Youth Philanthropy Club, a project of local high school students that has granted over $40,000 to Missoula organizations, including Maverick Baseball, the Poverello Center and the Missoula Food Bank. The Club teaches students about giving, fundraising, and volunteering with local nonprofits.

Most recently, the community foundation is sponsoring an ongoing project to build a Butterfly House and Insectorium. “It would be educational and a tourist attraction,” Dale said. “It would be nice to see in our community and we think it would stand on its own legs.”

Part of Dale’s work as a board member of both the Missoula Community Foundation and the Montana Community Foundation is working with Missoula nonprofits to take advantage of planned giving tools. “We try to work on behalf of the donor to help them give to the causes of their choice,” Dale said. “We talk to donors, charities and professional organizations about the sophisticated tools that can be used to enhance philanthropic giving.” Dale uses his own giving as an example. Although Dale and Nancy give directly to a variety of Missoula organizations, from the Missoula Food Bank to the National Coalition Building Institute, giving through the Missoula Community Foundation adds value to their gifts. “I can give more efficiently and the tax money that I save I can in turn pass on to those organizations,” Dale said.

A Montana native, Dale was born in Jordan and grew up in Ekalaka, Livingston and Miles City. He graduated from the University of Montana with a degree in Economics. “I paid my way through school tending bar at Stockman’s, so I would say I got my degree at the University of Montana but I got my education at the Stockman’s bar in Missoula,” he joked.

Dale has worked in the financial services industry since 1976, currently serving as Vice President of Investments at UBS. Dale is known for sharing what he knows about philanthropy with his clients. “It’s probably not malpractice if I don’t discuss philanthropy with my clients, but I consider it a sin of omission if I don’t,” he said. “And in that conversation, I have to acknowledge that no one is wrong in the way that they want to or don’t want to give. Everybody’s different. But everybody on earth has the ability to be a philanthropist.”
New Board Members

At the annual meeting in October, the Foundation board appointed Brian Patrick and Cynthia R. Woods to the board of directors.

A founding board member of the Broadwater Community Foundation, Brian Patrick brings extensive community building experience to the Foundation board. Brian has served for fifteen years as Superintendent of Schools in Townsend. Brian also serves on the boards of the Townsend Area Chamber of Commerce, the Broadwater County Lions Club, Broadwater County Development Corporation and School Administrators of Montana. In 2007, Brian was awarded the G.V. Erickson Award, the most prestigious honor for Montana school administrators, for his innovative programs in the Townsend school district. “I believe that we are lucky to live in a great country, state and region,” Brian said. As a Foundation board member, Brian hopes to “work for the betterment of not only the Montana Community Foundation, but local community foundations across the state.”

Cynthia R. Woods, attorney-at-law, brings her skill in estate planning to the board. Cynthia owns a private law practice, in which she specializes in estate planning, estate and trust administration, guardianship/conservatorship proceedings and business succession planning. Cynthia was born and raised in Plentywood, Montana. She received her undergraduate degree (magna cum laude) in finance from the University of Denver, her law degree (with honors) from the University of Montana and an advanced tax law degree from the University of Miami. She is married to John Woods, a Billings native. They have a son, Dayton, who is 23 years old and lives in Montevideo, Uruguay, and a daughter, Morgan, who is 16 years old and attends Billings West High School. Cynthia also serves as a member of the Yellowstone Guardianship Council (a group of professionals that volunteer as court-appointed guardians for incapacitated residents that do not have family that can serve) and on the Cottonwood Park Advisory Board.
Warren Vaughan was a lifelong resident of Billings who wanted to make a difference in the lives of the city’s children. He was an engaged member of the Billings community, president of a local bank, a board member of numerous charitable and educational organizations, and a philanthropist whose legacy is still living on in Billings.

Warren was a third-generation Montanan. His grandfather, Jabez Warren Vaughan, came to Montana in 1879 and started a grocery store in Coulson. In 1882, Jabez moved to Billings and established the first upscale restaurant, the Delmonico. He was a founding member of many Montana fraternal organizations, including Ashlar Lodge. In 1912, Jabez Vaughan became manager of the Northwestern Oil and Refining Company and the Montana & Wyoming Oil Company.

Born in 1921, Warren began his banking career at age 14 as a messenger for the Security Trust and Savings Bank. He retired as the bank’s president.

“He was a wonderful father,” his daughter, Mary, remembers. “He was always whistling and joking, and he was always patient and gentle.”

She laughs as she remembers wrecking her mother’s convertible in high school. “I showed him what I had done, and his comment was ‘sometimes we become too familiar with things and we become careless.’ I thought that was very important.”

Warren was a graduate of the University of Montana School of Law and served on the board of the University of Montana Foundation. “He loved the University,” Mary said. “He loved to lead the fight song at Grizzly football games.”

In 1988, Warren used a gift of real estate to establish the Children’s Endowment Fund at the Montana Community Foundation. Warren sent the Fund’s first grant to Community Leadership Development, a Billings nonprofit that provides housing assistance to low-income families.

The Children’s Endowment Fund was established to improve the health and welfare of children. Warren wanted the fund to help children with little things, like “a prom dress, eye glasses, a warm coat or gas money to assist the parents...Stated another way, I’m thinking of little kids who are hungry, ill, tired or otherwise hurtin’, whose lives might be made at least a little better with some timely assistance,” Warren wrote.

Until he passed away in 2009, Warren’s fund granted over $45,000 to Billings nonprofits. Eagle Mount, Tumbleweed Runaway Program, the Billings Public High School Angel Fund, and the Boys & Girls Club of Yellowstone County were some of the recipients of grants from The Children’s Endowment Fund.
When he set up the Children’s Endowment Fund, Warren specified that after his death the control of grantmaking decisions would pass to the Foundation’s board of directors.

“The Montana Community Foundation is privileged to have donors like Warren Vaughan, who leave their legacy in our hands,” said Foundation President and CEO Linda Reed. “Our first priority is to make grants that we know the donor would approve of, that fulfill the purpose of the fund the donor had in mind. We think the Head Start program is a great fit in this case.”

In September, the Foundation decided to grant over $24,000 to the Head Start program in Billings. Head Start was a clear choice for the Children’s Fund because they provide comprehensive education, health, nutrition, and social services to low-income children. The Billings area Head Start program serves 360 low-income preschoolers in Billings, Hardin, Joliet, Laurel, Lockwood and Red Lodge.

“Head Start, Inc. is so grateful for the incredible gift from Warren Vaughan’s fund,” said Head Start Executive Director Kathy Kelker. “The children who attend Head Start in Billings all live in families with income levels below the federal poverty level. The typical child enters the program well behind middle class peers in terms of vocabulary and language skills.”

The grant will be used to purchase Language for Learning Classroom Kits, which help children learn basic language structures and vocabulary. “Thanks to the Vaughan gift, we are implementing Language for Learning, a very detailed research-based program that is designed to help the children learn many new words in a relatively short time,” Kelker said. “We are already seeing great progress!”

The grant will also sponsor the Read Aloud with Dad Program, an activity-based program that will teach fathers how to read with children and develop their interest in learning. Children will receive free books at each event that are appropriate for fathers to read aloud.

“Because of the gift, we have also hired Anita Rowlinson to be our music teacher,” Kelker said. “She is such a delight and very gifted in working with young children.” The grant will purchase drums, pipes and guitars for the classroom.

“The Vaughan Trust gift has opened new horizons for our children,” Kelker said. “It will pay huge dividends in their futures.”
In October, the Foundation sent delegates from three Montana cities to Community Matters, a conference attended by community leaders from cities and towns across the country. The conference, a program of the Orton Family Foundation, brings community builders together to find solutions to the challenges small towns and cities face. Montana community leaders from Anaconda, Forsyth and Glendive attended the conference to learn new skills, build relationships with their peers and become inspired by the possibilities of rural communities.

A MSU Extension agent, elected official and a board member of a local community foundation formed delegations representing each community. Each group attended to explore the possibilities of collaboration between community foundations and local governments. “I thought it was a great idea to send community teams,” said Marvin Quinlan, a board member of the F.A.I.R. Community Foundation. “I believe that will immediately multiply the impact of the conference.”

The conference workshops emphasized storytelling as an important tool for collaborative community planning. Peggy Iba of Glendive attended the conference as a representative of the Greater Glendive Community Foundation. “I especially learned the value of stories,” she said. “Before you can implement change, people need an opportunity to be heard, to tell their stories.”
“It was one of the best, most interactive conferences I have ever attended,” Quinlan said. “I left the conference better educated, more motivated, and...far better prepared to deal with important issues impacting my community and our state.”

All the participants left the conference with big plans for collaborating on community projects. “This activity resulted in three different initiatives I am pursuing here to build community capacity and increase our involvement in the public arena,” Quinlan said.

“Successful foundations play a leadership role in their communities,” Iba said. The conference brought to the forefront the important role leadership role community foundations can play. Community foundations have the ability to form key partnerships with governments, nonprofits and citizens to change public policy and create a long-term vision for a community. The conference added some new ideas to each community foundation’s toolbox.

“The conference motto was ‘Steer the Change.’ That was clearly accomplished,” Quinlan said. ∞

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Funds

Affiliates

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Blackfeet Community Endowment
Magic In Your Hands Endowment
Blaine County Community Foundation
Broadwater Community Foundation
Ray Doig Memorial Fund
Butte-Silver Bow Community Foundation
Carter County Community Foundation
Columbus Community Foundation
Community Foundation for a Better Bigfork
Calberton Area Community Foundation
Darby Town Endowment Fund
F.A.I.R. Community Foundation
Great Falls Area Community Foundation
Greater Glacier Foundation
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Hill County Community Foundation
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Missoula Community Foundation
Musselshell County Foundation
Nye Community Foundation
Phillips County Community Foundation Endowment Fund
Little White Church Fund
Phillips County Community Foundation
FBO Malta Senior Citizens
Phillips County Community Foundation
FBO Phillips County Historical Society
Phillips County Rural Fire Dept/Trafon Area Endowment
Sacred Methodist Church Endowment
Powder River Community Endowment Fund
Powell County Community Foundation
Prairie Benefits Community Foundation
Red Lodge Area Community Foundation
Redwater Community Foundation
Richland County Community Foundation
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To our partners... thank you

We are a small staff here at the Montana Community Foundation. Beyond our office, we have several business partners that contribute enormously to the work we do. In the end, we are only as good as the people we work with, both inside and out. Here are the business partners that keep us out of jail, improve our efficiency, make us look good and make our work pleasurable.

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Each year, professional advisors like the ones listed below talk with their clients about their charitable interests, our great state, and how they might make a real difference in their communities.

We are thankful when the Montana Community Foundation can be a part of those conversations—it communicates an invaluable level of trust in our leadership and belief in our mission. We’d like to extend thanks to:

Sol Lovas
James J. Masar
Joanne M. McCormack – Browning, Kaleczyc, Berry & Hoven
Richard Wiens, CPA – CHMS
Norman Williamson, CPA – Anderson ZurMuehlen & Co
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William Temple, Greater Glendive Community Foundation Endowment in honor of Jerry Zander

United Way of Lewis & Clark County, Pearl and Bob Richardson Endowment Fund of the United Way of Lewis & Clark County in honor of Marge Short

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Thomas and Marlene Agnew, Wibaux Endowment Fund in memory of Bert and Marion Faschung

Anonymous, F.A.I.R. Community Foundation in memory of Marvin Quinlan, Sr.

Virginia and Michael Archdale, Wibaux Endowment Fund in memory of Betsy Marcus

Sheila and Ronald Ball, F.A.I.R. Community Foundation in memory of Marguerite Bradley

William and Joan Cunningham, F.A.I.R. Community Foundation in memory of Pat Mysse

Jean and Floyd Dahlman, F.A.I.R. Community Foundation in memory of Rita Philbrick and Marvin Quinlan, Sr.

Marjorie Throm Donoghue, Great Falls High School Class of 1951 Scholarship in memory of Wilma Sorenson Skinner

Kay Doubles, Wibaux Endowment Fund in memory of Ralph Doubles

Laura and Edwin Dukart, Wibaux Endowment Fund in memory of John and Betty Dukart

Debra and Larry Gibson, Fort Peck Theatre Preservation Endowment Fund in memory of Ken Buechler and Clifford Gossen

Marjorie and Roland Gorham, Wibaux Endowment Fund in memory of J.M. Shea

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Nancy Marks, Canton Church Endowment in memory of Dale Folkword

Doug Martens, F.A.I.R. Community Foundation in memory of Pat Mysse and Marvin Quinlan, Sr.

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Donald J. Wilson, Great Falls High School Class of 1951 Scholarship in memory of Arlene Wilson

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If you feel indebted to your community for the education you received, the opportunities that have come your way, and the quality of life you have enjoyed, here is your chance to give back. Go to our website, www.mtcf.org, and click on Local Community Foundations to locate your LCF, then go back to the home page to make a donation.

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