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23

ANNUAL
COMMUNITY REPORT



Dear Friends and Supporters,

We live in a special place, and for me and my family, being outdoors brings tremendous joy. Our community's access to connected open spaces and outdoor recreation is invaluable. And thanks to a shared vision, we have protected many of our community core values forever through a legacy of conservation and recreation.

For the people who call Whitefish home, whether longtime residents or recent arrivals, preserving land for public use is essential. Together, we have built something wonderful that is thriving and is making our community a better place, one acre and one trail mile at a time.

We have conserved thousands of acres around Whitefish Lake, and we have built miles of quality public trails. I am in awe at the remarkable work our community has achieved. Protecting and enhancing the environment around us is perhaps the most critical issue of our time. Our leaders continue to be proactive in maintaining the character and quality of life we share. We have an incredible opportunity to fulfill our community's vision and beyond. And we are poised to continue this vital work far into the future. It is a privilege to be a part of it all.

Reid Sabin, Incoming Board Chair

MISSION

Whitefish Legacy Partners is a non-profit organization whose community-minded vision ensures conservation, recreation, and education on the lands around Whitefish for future generations. Our work includes conserving important viewsheds, watersheds, forests, and wildlife habitat on public and private lands through conservation agreements and acquisitions while simultaneously creating high quality recreation opportunities, including our anchor project, the Whitefish Trail.



CONSERVATION

We protect our important local lands and unparalleled recreation opportunities to ensure open lands, scenic viewsheds, connected wildlife corridors, and quality drinking water for generations to come.

Our community-driven work creates recreation opportunities and permanent public access, supports sustainable timber management, and ensures MT School Trust Lands are not lost to development through innovative conservation strategies.



RECREATION

The Whitefish Trail is a regional, multi-partner project established in 2010 to develop a 55+-mile recreational trail system encircling the community of Whitefish and Whitefish Lake.

The natural-surface, non-motorized trail winds through vibrant forests, visits scenic lakes, and explores our protected open lands. Hiking, biking, fishing, or simply enjoying being outside with family, the Whitefish Trail provides permanent, public recreation just steps from town.



EDUCATION

Education on the Whitefish Trail offers a unique opportunity to cultivate connections between our community, our natural lands, and our outdoor heritage. The WT Learning Pavilion at Lion Mountain offers a base for our year-round, free environmental education programs. We strive to educate locals, visitors, and youth about the interwoven elements of a thriving ecosystem while fostering an appreciation for the special places surrounding our community.



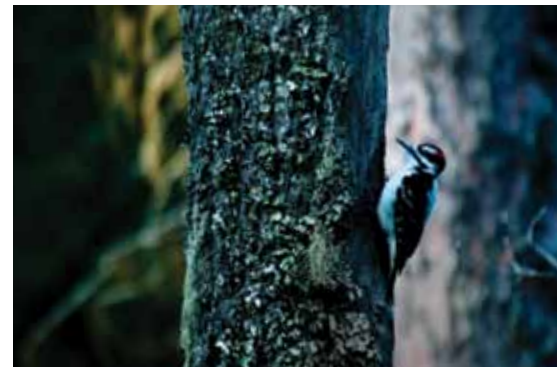
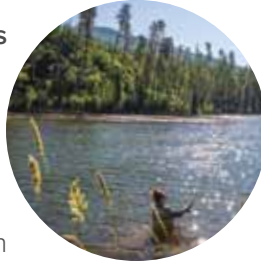
CONSERVATION

Twenty years ago, our community forged a shared path forward and took a stand to protect and support our local public lands. At times the vision seemed lofty and ambitious. How would we permanently protect high-value land from development, sustainably manage the surrounding forests to keep local timber jobs alive, and connect these important places with the Whitefish Trail? With what often seemed like a million moving parts among public and private partners, complex planning and design, innovative thinking, and creative funding strategies, our past conservation successes stand as inspiring community accomplishments.

Now the focus is centered on our community's backdrop at the head of Whitefish Lake, which deserves a permanent solution. Smith Lake and Swift Creek offer incredible views, easy access, and critical conservation connectivity. Smith Lake is a popular hiking, picnicking, fishing, ice skating, and bird watching recreation area. The lake has long been a recreation gem used for many generations. Swift Creek is a fast moving, pristine waterbody that feeds into Whitefish Lake and is a popular destination. This highly prized area owned by the state is at risk of future development or loss.

Community

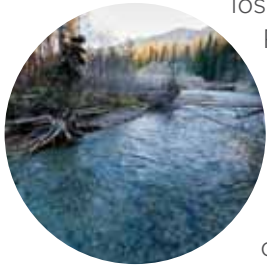
Over the past decade, our community's conservation lands have grown to surround Whitefish Lake. Acre by acre, our community has placed 40+ square miles of local lands into permanent conservation protection. It's an astounding accomplishment for our small mountain town and one that took thoughtful, community-wide decision making and support. The next community conservation project—Smith Lake-Swift Creek Legacy—has at times seemed overwhelming, but Whitefish Legacy Partners, the City of Whitefish, Montana DNRC, Flathead National Forest, and multiple private landowners are working hard to make another community conservation dream a reality.



Connections

The Smith Lake-Swift Creek Legacy project is a rare opportunity to protect vital wildlife habitat and travel corridors, ensures landscape scale connectivity critical to watershed protection, and provides public access in perpetuity. The project also promises to safeguard the healthy function and pristine water quality of Swift Creek, Smith Lake, and Smith Creek, all of which flow into Whitefish Lake and provide the city its' drinking water.

If this state land were subdivided and developed, it would inevitably result in the loss of irreplaceable wildlife habitat and watershed health. Removing development rights from this parcel will allow the state to maintain ownership while ensuring no development and permanent protection, sustainable forest management, and public recreational access forever. Conservation surrounding Smith Lake and Swift Creek will set aside important lands for habitat connectivity and also provide a critical link for the Whitefish Trail.



An aerial photograph of a dirt trail winding through a dense forest of evergreen trees. A person is visible on the trail, walking away from the viewer. The lighting is bright, casting shadows from the trees. In the top-left and bottom-right corners, there are white, stylized illustrations of ferns and pine needles respectively.

RECREATION

Whether you are looking for a quiet outdoor experience to share with your family or a challenging mountain bike ride with friends, the Whitefish Trail has it all. Users of the most popular stretches of the WT love seeing friends and families on the trail. Others enjoy the solitude and serenity found at Smith Lake or Dollar Lake or simply the spectacular views from Holbrook Overlook. In 2023, we improved family friendly access to Smith Lake at the north end of Whitefish Lake, which now promises once again to be a special place on the Whitefish Trail to bird watch, paddle, fish, ice skate, or just enjoy a quiet place outside.

There is value in all these experiences. Moving forward, we are refining how we spread the word about each area's unique character, and as we add more loops and connections to the Whitefish Trail, we also have plans to add user-specific trails.

Smith Lake

2023 Whitefish Trail Smith Lake recreation improvements include an upgraded trail down to the lake, a viewing platform, a lakeside bench, and our first ever floating dock for anglers, hand-carry boaters, and swimmers. This project improves public access to Smith Lake, protects the earthen dam at the foot of the lake, and rehabilitates areas to prevent future vegetation trampling and shoreline erosion.



These Smith Lake lakeshore improvements are the first phase of recreation development in the larger Smith Lake-Swift Creek project. Once conservation protection is secure, we plan to construct fifteen miles of connected trail (some hiker only, others biker only), five bridges, and two trailheads to guarantee free, sustainable recreation for the public forever.

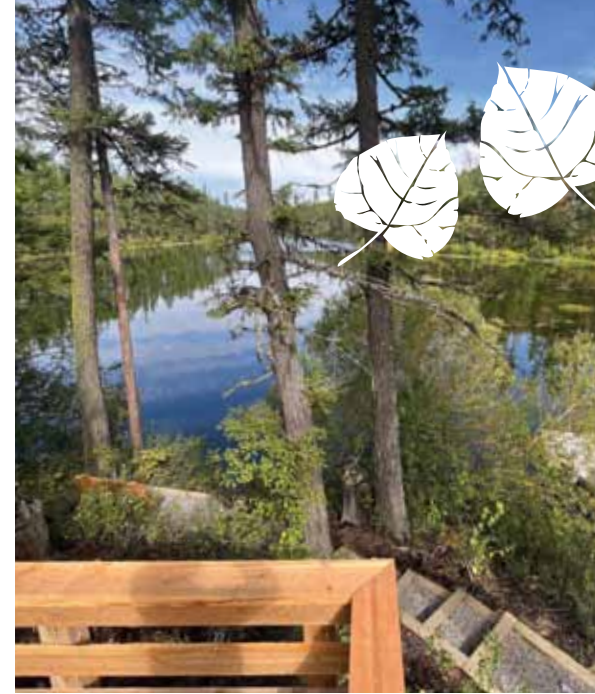
Partners

The Whitefish Trail is a community driven, collaborative effort that links the lands surrounding Whitefish Lake and our community. The system ties together the city's paved trails with Whitefish Mountain Resort, DNRC State Trust Lands, Flathead National Forest lands, MT Fish Wildlife & Parks fishing and boating sites, trail easements from Flathead Land Trust, The Nature Conservancy, and Montana Land Reliance, and numerous other private trail easements. We work collaboratively with Flathead Area Mountain Bikers and Glacier Nordic Club, with whom we co-manage sections of the trail. And thanks to the vision and design by Forestration, the Whitefish Trail is the unique network of stacked loops and flowy trails that is Whitefish's incredible outdoor recreation asset.



Maintenance

As a multi-use, natural surface trail that crosses through numerous landscapes and is designed for a wide variety of users, ongoing maintenance is critical to our trail system. A diversity of techniques are required to ensure the trails remain functional and enjoyable for all recreationists. The Volunteer Adopt-a-Trail crews and WT Trail Crew volunteers who participate in trail workdays contribute to the success of the Whitefish Trail. If you are interested in learning more or volunteering, please visit our website's volunteer page.





EDUCATION

The Whitefish Trail is a special place for the community to explore and learn about the unique nature of our forests, lakes, and surrounding ecology. WLP education programs on the Whitefish Trail provide adults, kids, and school groups connections to the outdoors to gain an appreciation for the natural environment and our open conservation lands. Our free programs and fee-based kids camps provide inspired learning in the best classroom – the outdoors!

Whitefish Trail education programs connect the community to our protected lands and, through learning, a deeper understanding of the importance of conservation is created. Over the years these programs have expanded to include health and wellness for adults and giving kids a place and time to play and explore in the forest using their imagination.

Adult WT Education

We all know that hands-on experience is great for teaching kids, and WLP believes it is also a great approach for adults! We offer engaging and experience-based adult education programs that inspire learning and connecting with the community on the Whitefish Trail. When you join us at a Bear Aware hike, you get a chance to spray an inert canister of bear spray. When you come to Photography on the Trail, you'll learn new hands-on techniques from a local, professional photographer. Whether you are new to the area and want to meet people and learn about the local flora and fauna or have lived here forever and are excited to spend time with a local expert on the Whitefish Trail, there is a WT education program for you.



Kids WT Education

Quality outdoor education youth programming is more important than ever. If you have a little one and want to help their curiosity and creativity bloom, try one of our youth-oriented outdoor programs on the Whitefish Trail. Based at the Lion Mountain Learning Pavilion, we offer programs from one-week camps to parent-child activities that will help your kids connect to the land and the community through shared experiential learning, play, and exploration. The pavilion is a dynamic outdoor learning space with opportunities to explore interpretive trails, natural wooded playscapes, and short hikes to the nearby Skyles Lake Overlook. Generations of local youngsters have come to love the Learning Pavilion over the past 10 years, and we hope to see you and your young ones!



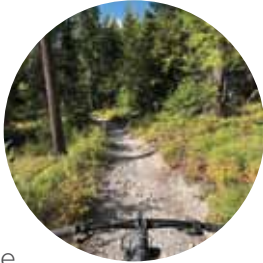


EVENTS

Whitefish Legacy Partners organizes three annual fundraising events that focus on community and support our local trails and open lands. These gatherings allow the community to come together and celebrate the Whitefish Trail and its impact on our lives.

Hit the Trail! Challenge

The annual Hit the Trail! Challenge reignites our community's passion for healthy living after a long cold winter. Throughout the month of May, participants log miles on the Whitefish Trail, with each mile translating to a \$1 donation from sponsors to our local conservation lands and trail network. In 2023, over 700 individuals, including 14 Workplace Teams and Whitefish Middle School students, collectively covered 31,790 miles through hiking, biking, running, and horseback riding. Together, demonstrating the dedication of our community, we raised \$31,790 to support the trail and our local conservation lands. Thank you to all participants and contributors for getting out, being healthy, and submitting your miles!



numerous food trucks, an exciting raffle, and kids' activities including a bike obstacle course and art station, there's something for everyone to enjoy. What makes this event even more special, is that all proceeds go directly to supporting Whitefish Legacy Partners, the Whitefish Trail, and our local conservation lands.

Whitefish Trail Legacy Run

Every autumn the Whitefish Trail Legacy Runs occur. Over the course of a fun-filled weekend, this lively event draws more than 1,000 enthusiastic participants, spectators, and volunteers from the Flathead and beyond. The 2023 race weekend began with a challenging 50k Mountain Ultra. The route took runners to the top of Big Mountain via the Whitefish Trail in Haskill, and the finish was at the Great Northwest Oktoberfest. Next year the 50k will start and finish at the Village at Whitefish Mtn Resort, traverse the WT in Haskill, and climb to Flower Point and the summit of Big Mountain. On Sunday, at the Whitefish Bike Retreat in Beaver Lakes, a variety of races cater to different preferences, including a half marathon, 10k+, 5k+, and a family fun run. This event brings our community together for a great cause and connects both locals and visitors to our cherished local landscape. In 2024 the WT Legacy Run will be rebranded as the **Whitefish Trail Blazer**.



Whitefish Trail Hootenanny

Each August the Whitefish Trail Hootenanny combines music, community, and fundraising for a great cause. Held annually in downtown Depot Park, this event draws over 1,500 individuals from our community to celebrate the Whitefish Trail and our open lands. With live music, local craft beer,

For more information on upcoming events, visit whitefishlegacy.org/events.



WHITEFISH TRAIL SPONSOR OF THE YEAR



HeartStone Advisors, a family-owned Whitefish business specializing in holistic wealth management, has been a dedicated supporter of the Whitefish Trail since 2018. Heartstone began as Adopt-a-Trail sponsors in 2018, 2019, and 2020, and grew to be an Event Sponsor for the Hit the Trail! Challenge. They also participated as a workplace team, and won the Challenge in 2022. HeartStone Advisors is actively dedicated to helping grow the Whitefish Trail into the cherished community asset it is today.

In 2022 HeartStone became a Legacy Sponsor, exemplifying their commitment to the Whitefish Trail. Their contributions go well beyond their 5-year annual financial investment as they symbolize a shared vision for a vibrant and sustainable future for our community and its natural spaces. Thank you HeartStone Advisors for your commitment to preserving our local lands.



We believe the Whitefish Trail is one of the most unique features of the place we call home. What other town boasts miles of well maintained, easily accessible, and safe trails for the public to use? The Whitefish Trail is just one of the many reasons we love calling Whitefish home.” - Maddie Montayne, Heartstone Advisors

To learn more about WLP’s sponsorship opportunities and how you can give back to the community, visit:
www.whitefishlegacy.org/ways-to-donate



FINANCIALS



WHITEFISH LEGACY PARTNERS ANNUAL OPERATIONS & PROGRAMS

Fiscal Year ending December 31, 2023

Whitefish Legacy Partners' programs supporting conservation, recreation, education, fundraising, and community outreach are the backbone of the organization. Six dedicated, paid staff lead the efforts working to accomplish the community's vision with guidance and leadership from a 12-person volunteer Board of Directors.



FISCAL SPONSORSHIP

Fiscal Year ending December 31, 2023

Revenue

Grants & Agreements	\$3,000
Non-profit Partners	\$7,853
Corporate Sponsors	\$370
Total	\$11,223

2024 USFS Cost Share Agreement

\$13,250

Expenses

Professional Services	\$8,645
Events	-
Administration	\$2,145
Total	\$10,790



LEAVE YOUR LEGACY!

WLP has an accredited charitable endowment with the Whitefish Community Foundation. The Montana Endowment Tax Credit (METC) allows donors to pay less Montana income tax when they give a planned gift to our WT Endowment Fund. The Fund supports trail maintenance in perpetuity and your gift will forever benefit the Whitefish Trail.

www.whitefishlegacy.org/ways-to-donate

ENDOWMENT BALANCE:

\$1,342,725

as of December 31, 2023

ANNUAL DISTRIBUTION:

5% OR ~\$55,000

in perpetuity

Revenue

	2023
Grants	\$14,200
Corporate Sponsors	\$53,875
Contributions:	
Friends & Families	\$37,210
Major Donors	\$122,087
Events & Merchandise	\$135,579
Education Programs	\$2,638
Investments:	
Prior Year Programs	\$100,000
Prior Year Great Fish Community Challenge	\$107,719
Total	\$573,308

Expenses

Operations:	
Conservation Programs	\$95,766
Education Programs	\$83,955
Recreation Programs	\$100,000
Professional Services	\$56,938
Fundraising	\$65,882
Community Outreach	\$72,310
Administration	\$21,240
Future Investments-2024 Programs	\$74,198
Total	\$570,289

Non-Cash Contributions

Volunteer Labor	\$46,730
In-Kind Goods & Services	\$27,219

THE WHITEFISH TRAIL

ANNUAL PROJECT

Fiscal Year ending December 31, 2023

WLP fundraises each year to support new construction and operations and maintenance on the Whitefish Trail.

NEW CONSTRUCTION

Smith Lake & Other Projects

Revenue	
Grants	\$74,050
Private Donations	\$104,887
Total	\$178,937

Expenses	
Planning & Design	\$16,556
Trail Construction	\$97,081
Trailhead & Amenities Construction	\$65,300
Total	\$178,937

OPERATIONS & MAINTENANCE

Revenue	
Grants	\$61,794
Partner Contributions:	
Glacier Nordic Club - Big Mtn. Trailhead	\$2,531
Flathead Area Mtn. Bikers - Spencer Mtn.	\$6,163
Endowment Distribution	\$56,598
Total	\$127,085

Expenses	
Operations	\$23,340
Maintenance	\$100,509
Total	\$124,848

Annual WT budget is managed collaboratively with the City of Whitefish, Parks & Recreation.

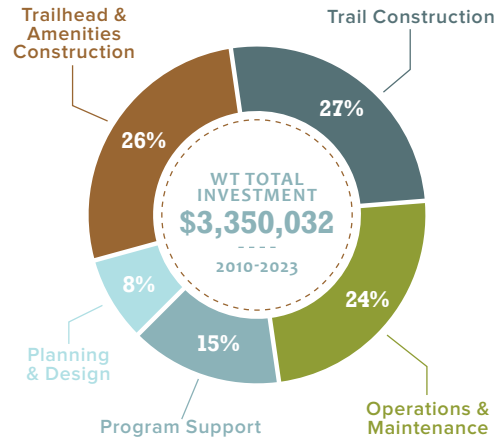
IN-KIND SUPPORT

Whitefish Legacy Partners	\$56,938
City of Whitefish Parks & Recreation	\$5,818
Glacier Nordic Club	\$880
Flathead Area Mountain Bikers	\$1,220
Professional Services & Contractors	\$1,085
Total	\$65,941

TOTAL PROJECT

2010-2023

The Whitefish Trail first opened in 2010 at Lion Mountain with new sections of the Whitefish Trail added each year. The original WT investment was led by community-minded donors and leveraged by WLP to secure Montana's largest Recreational Trails Program grant supporting a project of regional significance. Thirteen years later, with annual contributions thanks to the generosity of trail users, conservation-minded supporters, and local businesses, the Whitefish Trail is 47-miles, accessed from 15 trailheads, with education programs based at the WT Learning Pavilion at Lion Mountain.



FUTURE PROJECTS

2024-2030

WLP secures grants and contributions every year on behalf of the Whitefish Trail and plans for future construction, maintenance, and management.

WLP invests in the future of the Whitefish Trail strategically and with prudent fiscal responsibility. Recreation opportunities will expand at Smith Lake in 2024-2027, connect Holbrook Overlook to Hellroaring Basin in 2025, and connect Hellroaring Basin to Smith Lake in 2027. Future WT connections to Close the Loop on the Whitefish Trail optimistically will be completed by 2030.



New Construction Reserves	\$100,673
2023 Grants, 2023-2025	\$60,000
2023 Private Donations	\$45,000
2025 USFS Cost-Share – Hellroaring Basin	\$200,000
Total	\$405,673

COMMUNITY CONSERVATION

Never has the risk of development been so great and the importance of conservation been so beneficial. WLP's community-driven conservation projects remove development rights, protect open space and public access in perpetuity, and create high-quality recreation opportunities. In 2014, we protected 1,520 acres in Beaver Lakes forever. In 2016, 3,022 acres and the city's drinking water was protected in Haskill Basin. WLP acts as the local community catalyst to create beneficial outcomes and protect critical landscapes for the community.



SMITH LAKE LEGACY

Private Donations–2016-2022	\$1,062,120
Private Donations–2023	\$706,405
Foundations–2023	\$1,175,000
Private Donations–pledged, 2024-2026	\$1,705,500
Total	\$4,649,025

615-acre easement acquisition MT State Trust Land, Land Board consideration, August 2024.

BEAVER LAKES
\$7.3M
100% funded locally

HASKILL BASIN
\$16.7M
46% or \$7.7M funded locally

= \$24M
2012-2016



SUPPORT

 Thank you for supporting conservation, education, and recreation in our community!

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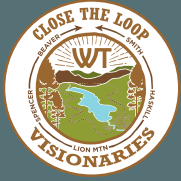
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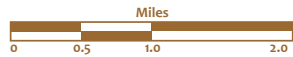
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- Distance From Downtown
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- Proposed City Paths
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