



BOARD OF TRUSTEES MEETING AGENDA

Tuesday, March 17, 2026 / 5:30 – 7:00 pm

Large Conference Room or Zoom:

<https://us02web.zoom.us/j/88672552263?pwd=iH364vYmDTodif3hO2qK43YWcNmQs.1>

Meeting ID: 88672552263

Passcode: cfncw

Chair: Jeff Ostenson, Presiding

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- | | |
|---|---|
| 1. Call to Order | (1 Min) |
| 2. Consent Agenda | (5 Min) |
| Financials | |
| Grants | |
| Gifts | \$1,397, 735 Jan/Feb |
| Scholarship Selection Committees | |
| Approval of Minutes: | |
| a) January 8, 2026 | Marketing, Development & Communications Committee |
| b) January 9, 2026 | Executive Committee |
| c) January 9, 2026 | Finance & Investment Committee |
| d) January 20, 2026 | Trustee Board Meeting |
| e) February 13, 2026 | Executive Committee |
| f) February 13, 2026 | Finance & Investment Committee |
| g) February 24, 2026 | Programs Committee |
| 3. Donor Appreciation Event & Bob White Award | (10 Min) |
| 4. FY2027 Trustee Nominations | (15 Min) |
| 5. Donor Advised Funds Investment Partnership | (20 Min) |
| 6. Grant County Leadership Institute | (20 Min) |
| 7. Director of Finance and Operations Hiring Update | (10 Min) |
| 8. Adjourn | (1 Min) |
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Next Meeting: Tuesday, May 19, 2026

Statement Of Financial Position

Date: 02/28/2026

Balance

Assets

Bank

1000	Cashmere Valley Bank Checking/Savings	(38,977.80)
1001	CVB Property Holdings LLC	250.85
1006	Stripe	13,092.60
		<u>(25,634.35)</u>

Investment Asset

1100	Nonpooled Investments	3,985.48
1400	Assets in Investment pool	155,091,328.96
1400.1	Voya	5,602,225.10
1405	Assets in Money Market	3,895,480.35
1410	Investments CRUTs	1,885,184.24
1425	AZ Wells	16,965,335.16
1427	NB Private Markets III	6,297.04
1428	NB Private Markets IV	647,337.10
1430	Gift Annuity Pool	85,443.33
		<u>184,182,616.76</u>

Other Current Asset

1003	Petty Cash	215.00
1500	Prepays	21,300.65
		<u>21,515.65</u>

Fixed Asset

2500	Equipment & Furniture	84,181.54
2520	Building	19,174.57
2700	Accumulated Depreciation	(81,276.63)
		<u>22,079.48</u>

Other Asset

1310	Notes Receivable	1,711,509.57
1320	Loans Receivable	3,116,999.99
1330	Discounts on notes receivable & non-cash gifts	(237,212.29)
1340	Assets held for sale - Stock Acct	218,746.38
1440	Interest Receivable	4,244.96
1450	Bequest Receivable	2,500.00
1520	Misc Receivable	(1,584.32)
1600	ROU Asset - Operating Lease	88,231.65

1800	Investment in 9 S Wenatchee Ave LLC	338,800.58
		<u>5,242,236.52</u>
	Total Assets	189,442,814.06
Liabilities		
<i>Accounts Payable</i>		
3000	Accounts Payable	21,306.55
3001	Scholarships Payable	579,459.14
3002	Grants Payable	(24,050.00)
		<u>576,715.69</u>
<i>Long Term Liability</i>		
3100	Refundable Advances	56,848,896.94
3300	Refundable Advances-AZ Wells	15,985,695.44
3400	Unitrust & Gift Annuity Obligation	1,157,213.22
3500	LT ROU - Operating Lease Liability	96,856.65
3600	Escrow Liability	660.00
		<u>74,089,322.25</u>
<i>Other Current Liability</i>		
3020	Giving Cards Liability	109,654.04
3110	Payroll taxes payable	34,314.96
3120	401K Payable	5,406.07
3200	Accrued vacation	4,925.56
9999999	Unapplied Payments	1,919.73
		<u>156,220.36</u>
	Total Liabilities	74,822,258.30
Net Assets		
<i>Net Assets</i>		
4000	Fund Balance	42,462,960.33
4100	Principal Balance	70,045,851.69
4200	Spendable Balance	2,111,492.89
4999	Beginning Balance	250.85
		<u>114,620,555.76</u>
	Total Net Assets	114,620,555.76
	Total Liabilities + Net Assets	189,442,814.06

03/10/26 09:02am PDT

Statement Of Activities

Date: 07/01/2025 to 02/28/2026

		Amount
Revenue		
<i>Investment Income</i>		
5200	Interest	967,542.14
5300	Dividends	2,229,396.77
5400	Realized Gains/Losses	(106,664.08)
5500	Un-Realized Gains/Losses	13,726,724.34
		<u>16,816,999.17</u>
<i>Support</i>		
5000	Gifts	23,489,080.47
5010	Gifts - Interfund	2,746,340.16
5100	Administration Fee Revenue	1,286,250.89
5110	Administration Fee Revenue-WVCF	(117,267.72)
		<u>27,404,403.80</u>
<i>Other Income</i>		
5750	Loan Interest	4,800.00
5800	Other income	195,618.49
		<u>200,418.49</u>
	Total Revenue	<u>44,421,821.46</u>
Expenses		
<i>Program</i>		
6000	Grants Expense	22,355,910.98
6010	Grants - Interfund	2,759,090.16
6015	Giving Cards	51,364.48
6100	Scholarships Expense	42,288.08
6200	Administration Fees Expense	1,286,292.40
		<u>26,494,946.10</u>
<i>Administration</i>		
7000	Investment Management fees	91,100.79
7020	CRUT payout expense	59,384.58
7030	Annuity Payout expense	7,947.42
7040	Salaries	499,883.25
7050	Payroll taxes	43,940.86
7060	Fringe Benefits	63,350.71
7070	Office Supplies	3,321.65
7080	Computer	60,958.99

7090	Printing & Copying	2,720.64
7100	Postage	3,213.25
7110	Dues, Subscriptions	7,232.63
7120	Accounting	59,468.40
7130	Consulting	80,587.50
7140	Staff	437.92
7180	Board & Committee meetings	2,083.64
7190	Telephone / Internet	2,183.78
7200	Utilities	5,637.61
7205	Repair & Maintenance	36,037.78
7230	Education	6,704.65
7250	Miscellaneous expense	124,521.26
7260	Events & Expenses (NPI, Leadership Institute)	40,183.99
7270	Website design & maintenance	3,688.54
7280	Rent Expense-OMAK	23,800.00
7290	Donor Development, legal	1,102.50
7300	Donor Development, other	2,915.75
7320	Taxes & License	2,599.51
7330	Travel, meals, meetings	22,175.14
7335	Marketing	58,292.84
		<u>1,315,475.58</u>
	Total Expenses	<u>27,810,421.68</u>
	Change in Net Assets	<u>16,611,399.78</u>

03/10/26 09:02am PDT

Community Foundation of North Central Washington
Budget

June 30, 2026

	7/2027 Operating	Legacy Fund	NonProfit Institute	Leadership Institute NCW	Impact Investing	Scholarships	Designated	Consolidated
REVENUE								
Gifts	\$ 100,000	-		40,000		-		140,000
Gifts - Interfund	15,000	560,000	40,000	-		1,400,000	1,700,000	3,715,000
Operating Surplus	-							-
Administration Fees Collected	1,560,000							1,560,000
Investment Income								-
Gain (Loss) on Sale of Securities								-
Interest and Dividends								-
Other Income (Expense)								-
Total Revenue	1,675,000	560,000	40,000	40,000	-	1,400,000	1,700,000	5,415,000
GRANTS								
Grants		560,000		25,000		1,400,000	1,700,000	3,685,000
Grants - Interfund		-				-		-
Other Grant Related Expenses			40,000					40,000
	-	560,000	40,000	25,000	-	1,400,000	1,700,000	3,725,000
OPERATING EXPENSES								
Salaries	1,060,361							1,060,361
Payroll Taxes	86,645							86,645
Fringe Benefits	110,042							110,042
Office Supplies	6,000			7,500				13,500
Office Supplies-OMAK	3,000							3,000
Computer & Software Support	75,000							75,000
Printing & Copying	6,000							6,000
Printing & Copying-OMAK	-							-
Postage	5,000							5,000
Postage-OMAK	-							-
Dues and Subscriptions	10,000							10,000
Dues, Subscriptions-OMAK	-							-
Accounting	40,000							40,000
Consulting	25,000			48,000				73,000
Staff	1,000							1,000
Legal	2,500							2,500
Insurance	14,000							14,000
Board & Committee Meetings	4,500							4,500
Board & Committee Meetings-OMAK	-							-
Telephone / Internet	3,500							3,500
Telephone / Internet-OMAK	3,000							3,000
Utilities	4,000							4,000
Utilities-OMAK	6,000							6,000
Repairs, Maintenance Office	8,000							8,000
Repairs, Maintenance Office-OMAK	7,000							7,000
Education	5,000							5,000
Education-OMAK	-							-
Depreciation	4,000							4,000
Miscellaneous	1,000							1,000
Website Design & Maintenance	12,000							12,000
Rent Expense-OMAK	50,000							50,000
Donor Development, Legal	-							-
Donor Development, Other	30,000							30,000
Taxes & Licenses	1,000							1,000
Travel, Meals, Meetings	15,000			44,000				59,000
Travel, Meals, Meetings-OMAK	8,500							8,500
Marketing	45,000							45,000
Total Grants and Operating Exp	1,652,047	560,000	40,000	124,500	-	1,400,000	1,700,000	5,476,547
TRANSFERS	(84,500)			84,500	-			-
UNREALIZED GAIN (LOSS) ON SECURITIES								
CHANGE IN ASSETS PRIOR TO CAPITA	(61,547)	-	-	-	-	-	-	(61,547)
CAPITAL EXPENDITURE ITEMS								
CHANGE IN NET ASSETS	\$ (61,547)	-	-	-	-	-	-	(61,547)

grant_date	vendor_name	amount	fgroup_name
1/1/2026	Carlson, Daeja	\$ 2,500.00	Field of Interest
1/1/2026	Celebration Lutheran Church	\$ 1,000.00	Donor Advised
1/1/2026	High Country News	\$ 100.00	Donor Advised
1/1/2026	Perez, Yasmin	\$ 2,500.00	Field of Interest
1/3/2026	First United Methodist Church	\$ 5,000.00	Designated
1/3/2026	Lighthouse Christian Ministries	\$ 5,000.00	Designated
1/3/2026	Wenatchee Valley Fund	\$ 20.00	Unrestricted
1/3/2026	Wenatchee Valley YMCA	\$ 1,000.00	Designated
1/4/2026	Salvation Army - Ray and Joan Kroc Center	\$ 200.00	Donor Advised
1/5/2026	ALS Northwest	\$ 100.00	Donor Advised
1/5/2026	Chelan Douglas CASA Agency Fund	\$ 150.00	Unrestricted
1/5/2026	Chelan-Douglas Land Trust	\$ 1,000.00	Donor Advised
1/5/2026	EASE Cancer Foundation	\$ 1,000.00	Donor Advised
1/5/2026	Evergreen Mountain Bike Alliance	\$ 1,000.00	Donor Advised
1/5/2026	Faith Lutheran Church	\$ 850.00	Donor Advised
1/5/2026	Holden Village	\$ 1,000.00	Donor Advised
1/5/2026	Inland Northwest Honor Flight	\$ 1,000.00	Donor Advised
1/5/2026	Methow Valley Community Center	\$ 5,000.00	Donor Advised
1/5/2026	National Park Foundation	\$ 1,000.00	Donor Advised
1/5/2026	Northwest Public Broadcasting	\$ 1,000.00	Donor Advised
1/5/2026	Okandogs	\$ 500.00	Donor Advised
1/5/2026	Operating Fund	\$ 5,000.00	Unrestricted
1/5/2026	Operating Fund	\$ 5,000.00	Unrestricted
1/5/2026	Rock Bottom Rocker Pet Pantry	\$ 50.00	Donor Advised
1/5/2026	Saddlerock Evangelical Presbyterian Church	\$ 800.00	Donor Advised
1/5/2026	Samuel Merritt University - office of Advancement	\$ 750.00	Donor Advised
1/5/2026	TwispWorks Foundation	\$ 500.00	Donor Advised
1/5/2026	Weiser School District	\$ 200.00	Donor Advised
1/5/2026	Well Done Foundation Inc	\$ 1,000.00	Donor Advised
1/5/2026	Wenatchee Valley Humane Society	\$ 500.00	Donor Advised
1/5/2026	Wenatchee Valley Symphony Orchestra Endowment Fun	\$ 400.00	Donor Advised
1/5/2026	World Central Kitchen	\$ 1,000.00	Donor Advised
1/5/2026	Xerces Society, Inc	\$ 1,000.00	Donor Advised
1/6/2026	Chelan County Volunteer Search & Rescue	\$ 9,000.00	Field of Interest
1/6/2026	Heritage Heights at Lake Chelan	\$ 7,500.00	Field of Interest
1/6/2026	Lake Chelan Recreation Development Foundation	\$ 5,000.00	Field of Interest
1/6/2026	NCW Libraries	\$ 20,000.00	Agency
1/6/2026	Northwest Avalanche Center	\$ 1,000.00	Donor Advised
1/6/2026	Northwest Immigrant Rights Project	\$ 500.00	Donor Advised
1/6/2026	Town of Waterville	\$ 3,000.00	Field of Interest
1/7/2026	Cancer Care of NCW	\$ 100.00	Donor Advised
1/7/2026	Chelan-Douglas Land Trust Endowment for the Future Fi	\$ 75.00	Donor Advised
1/7/2026	Give NCW	\$ 1,250.00	Donor Advised

1/8/2026 Give NCW	\$	25.00	Donor Advised
1/8/2026 Historic Seattle Preservation Foundation	\$	2,000.00	Donor Advised
1/8/2026 Medic One Foundation	\$	5,000.00	Donor Advised
1/8/2026 Mercy Ships International	\$	10,000.00	Donor Advised
1/8/2026 Salvation Army NW Division	\$	10,000.00	Donor Advised
1/8/2026 Seattle Children's Hospital Foundation	\$	20,000.00	Donor Advised
1/8/2026 Upper Valley MEND	\$	1,454.35	Unrestricted
1/8/2026 Wenatchee Valley Mat Cats Youth Wrestling	\$	10,000.00	Donor Advised
1/9/2026 Cashmere Museum and Pioneer Village	\$	4,093.75	Unrestricted
1/9/2026 Chelan County Mountain Rescue Association	\$	8,685.95	Unrestricted
1/9/2026 Chelan-Douglas CASA	\$	16,441.75	Unrestricted
1/9/2026 Chelan-Douglas Community Action Council	\$	18,916.75	Unrestricted
1/9/2026 Chelan Douglas County Volunteer Attorney Services	\$	12,868.75	Unrestricted
1/9/2026 Chelan-Douglas Land Trust	\$	32,504.75	Unrestricted
1/9/2026 Chelan Senior Center	\$	4,366.75	Unrestricted
1/9/2026 Chelan Valley Hope	\$	15,246.75	Unrestricted
1/9/2026 Chelan Valley Housing Trust	\$	5,391.75	Unrestricted
1/9/2026 Columbia Breaks Fire Interpretive Center Foundation	\$	5,243.75	Unrestricted
1/9/2026 Columbia Valley Affordable Homeownership	\$	2,876.75	Unrestricted
1/9/2026 Common Ground Community Housing Trust	\$	9,658.75	Unrestricted
1/9/2026 Communities In Schools of North Central Washington	\$	5,021.75	Unrestricted
1/9/2026 Foundation for Youth Resiliency and Engagement	\$	5,833.00	Unrestricted
1/9/2026 Garden Terrace Senior Living	\$	4,223.75	Unrestricted
1/9/2026 Girls on the Run (Columbia Valley Community Health)	\$	4,364.25	Unrestricted
1/9/2026 Grace City Church	\$	2,500.00	Donor Advised
1/9/2026 Grace City Church	\$	2,500.00	Donor Advised
1/9/2026 Grace City Church	\$	2,500.00	Donor Advised
1/9/2026 Grace City Church	\$	2,500.00	Donor Advised
1/9/2026 Greater Leavenworth Museum	\$	7,513.00	Unrestricted
1/9/2026 Green Okanogan	\$	5,408.00	Unrestricted
1/9/2026 Grunewald Guild	\$	1,000.00	Donor Advised
1/9/2026 Grunewald Guild	\$	5,000.00	Field of Interest
1/9/2026 Habitat For Humanity of the Greater Wenatchee Area	\$	11,994.75	Unrestricted
1/9/2026 Happy Letters Association	\$	3,304.92	Unrestricted
1/9/2026 Historic Downtown Chelan Association	\$	673.75	Unrestricted
1/9/2026 Tierra Learning Center	\$	1,500.00	Donor Advised
1/9/2026 Trigg-C M Russell Foundation Inc	\$	500.00	Donor Advised
1/12/2026 Akin of Seattle (formerly Children's Home Society of Was	\$	5,000.00	Donor Advised
1/12/2026 Common Ground Community Housing Trust	\$	800.00	Agency
1/12/2026 Confluence Health Foundation	\$	1,000.00	Donor Advised
1/12/2026 Haiti Bible Mission	\$	1,000.00	Donor Advised
1/12/2026 Hand in Hand Immigration Services	\$	26,068.75	Unrestricted
1/12/2026 Indigenous Roots and Reparation Foundation	\$	6,367.75	Unrestricted
1/12/2026 Ingalls Creek Enrichment Center	\$	4,564.75	Unrestricted

1/12/2026	Lake Chelan Bach Fest	\$	6,860.41	Unrestricted
1/12/2026	Lake Chelan Health	\$	9,222.75	Unrestricted
1/12/2026	Lake Chelan Valley Habitat for Humanity	\$	6,866.75	Unrestricted
1/12/2026	Leavenworth Ski Hill Heritage Foundation	\$	4,206.75	Unrestricted
1/12/2026	Loup Loup Ski Education Foundation	\$	5,233.00	Unrestricted
1/12/2026	Master Gardener Foundation of Chelan-Douglas Countie	\$	7,208.75	Unrestricted
1/12/2026	Mobile Meals of Wenatchee	\$	18,669.75	Unrestricted
1/12/2026	Mountain Meadows	\$	9,171.75	Unrestricted
1/12/2026	Mountain Sprouts Children's Community	\$	7,868.75	Unrestricted
1/12/2026	NCW Arts Alliance	\$	7,409.75	Unrestricted
1/12/2026	NCW Community Toy Drive	\$	9,258.75	Unrestricted
1/12/2026	North Central Education Foundation	\$	4,139.75	Unrestricted
1/12/2026	North Valley Community Health Association	\$	5,591.75	Unrestricted
1/12/2026	Northwest Immigrant Rights Project	\$	31,536.75	Unrestricted
1/12/2026	Numerica Performing Arts Center	\$	7,283.75	Unrestricted
1/12/2026	Okanogan County Artists Association	\$	570.00	Unrestricted
1/12/2026	Okanogan County Historical Society	\$	3,068.00	Unrestricted
1/12/2026	Okanogan County Long Term Recovery Group	\$	3,438.00	Unrestricted
1/12/2026	Okanogan County Search and Rescue Association	\$	7,118.00	Unrestricted
1/12/2026	Okanogan Highlands Alliance	\$	5,093.00	Unrestricted
1/12/2026	Okanogan Land Trust	\$	7,083.00	Unrestricted
1/12/2026	Okanogan Regional Humane	\$	6,008.00	Unrestricted
1/12/2026	Our Valley Our Future	\$	7,571.75	Unrestricted
1/12/2026	Pateros Treehouse Early Education Organization	\$	4,628.00	Unrestricted
1/12/2026	Plain Valley Ski Trails	\$	4,226.75	Unrestricted
1/12/2026	Planned Parenthood of Greater Washington and North Id	\$	25,781.75	Unrestricted
1/12/2026	Pybus Market Charitable Foundation	\$	5,506.75	Unrestricted
1/12/2026	Ridge 2 River Animal Haven and Humane Education	\$	7,119.25	Unrestricted
1/12/2026	Rock Bottom Rocker Pet Pantry	\$	1,000.00	Donor Advised
1/12/2026	Sage Advocacy Center	\$	14,911.75	Unrestricted
1/12/2026	Serve Wenatchee Valley	\$	31,200.58	Unrestricted
1/12/2026	Small Miracles	\$	19,889.75	Unrestricted
1/12/2026	Stage Kids WA	\$	9,508.75	Unrestricted
1/12/2026	St. Vincent de Paul Society	\$	20,544.75	Unrestricted
1/12/2026	Sustainable NCW	\$	14,410.75	Unrestricted
1/12/2026	Team Okanogan Animal Rescue	\$	16,908.00	Unrestricted
1/12/2026	TEAMS Learning Center	\$	3,988.75	Unrestricted
1/12/2026	Tender Loving Care for Seniors	\$	7,421.75	Unrestricted
1/13/2026	Cancer Support Community Central Washington (former	\$	18,599.75	Unrestricted
1/13/2026	Fidelity Investments Charitable Gift Fund	\$	50,000.00	Donor Advised
1/13/2026	Kyrgyz - Washington Sister Region Organization	\$	4,000.00	Donor Advised
1/13/2026	The Knights Community Hospital Equipment Lend Progr	\$	5,859.75	Unrestricted
1/13/2026	The Nature Immersion Program	\$	2,658.00	Unrestricted
1/13/2026	Thrive Chelan Valley	\$	5,031.75	Unrestricted

1/13/2026	Tierra Learning Center	\$	11,771.75	Unrestricted
1/13/2026	Together for Youth	\$	3,701.75	Unrestricted
1/13/2026	Tonasket Food Bank	\$	16,100.50	Unrestricted
1/13/2026	TREAD (Trails & Recreation Engagement, Advocacy and C	\$	8,718.75	Unrestricted
1/13/2026	Upper Valley Connection	\$	6,408.00	Unrestricted
1/13/2026	Upper Valley MEND	\$	77,191.75	Unrestricted
1/13/2026	Velocity Swimming	\$	4,139.75	Unrestricted
1/13/2026	Waste Loop : Eastside Rebuild	\$	6,943.75	Unrestricted
1/13/2026	Wenatchee Area Genealogical Society	\$	3,873.75	Unrestricted
1/13/2026	Wenatchee Downtown Association	\$	2,509.75	Unrestricted
1/13/2026	Wenatchee Outdoors	\$	6,648.75	Unrestricted
1/13/2026	Wenatchee River Institute	\$	21,334.75	Unrestricted
1/13/2026	Wenatchee Valley Children's Guild	\$	500.00	Agency
1/13/2026	Wenatchee Valley College Foundation	\$	7,133.75	Unrestricted
1/13/2026	Wenatchee Valley Dispute Resolution Center	\$	6,314.75	Unrestricted
1/13/2026	Wenatchee Valley Humane Society	\$	26,246.75	Unrestricted
1/13/2026	Wenatchee Valley Museum and Cultural Center	\$	12,794.75	Unrestricted
1/13/2026	Wenatchee Valley Senior Activity Center	\$	10,758.75	Unrestricted
1/13/2026	Wenatchee Valley Symphony Association	\$	27,408.75	Unrestricted
1/13/2026	Wenatchee Valley YMCA	\$	14,953.75	Unrestricted
1/13/2026	Women's Resource Center of NCW	\$	37,746.00	Unrestricted
1/13/2026	YWCA North Central Washington	\$	19,151.00	Unrestricted
1/14/2026	NAMI North Central Washington	\$	4,000.00	Field of Interest
1/15/2026	Chelan-Douglas Land Trust	\$	100.00	Donor Advised
1/15/2026	Columbia Basin Cancer Foundation	\$	50.00	Donor Advised
1/15/2026	Faces for Hope	\$	1,200.00	Donor Advised
1/15/2026	Haiti Bible Mission	\$	150.00	Donor Advised
1/15/2026	Medical Teams International	\$	150.00	Donor Advised
1/15/2026	Northwest Public Broadcasting	\$	100.00	Donor Advised
1/15/2026	Open Arms Real Life Choices Clinic	\$	300.00	Donor Advised
1/15/2026	Operation Mobilization	\$	300.00	Donor Advised
1/15/2026	Pioneers	\$	150.00	Donor Advised
1/15/2026	Wenatchee Valley Humane Society	\$	500.00	Donor Advised
1/15/2026	Youth Dynamics	\$	100.00	Donor Advised
1/16/2026	AgForestry Leadership	\$	1,000.00	Donor Advised
1/16/2026	Aid to the Church in Need	\$	1,000.00	Donor Advised
1/16/2026	Catholic Medical Mission Board	\$	2,000.00	Donor Advised
1/16/2026	Catholic Relief Services	\$	1,000.00	Donor Advised
1/16/2026	Doctors Without Borders	\$	1,000.00	Donor Advised
1/16/2026	Holy Apostles Catholic Church	\$	6,000.00	Donor Advised
1/16/2026	National MS Society, Greater NW Chapter	\$	1,000.00	Donor Advised
1/16/2026	New Song Community Church	\$	100.00	Donor Advised
1/16/2026	Northwest Public Broadcasting	\$	5,000.00	Donor Advised
1/16/2026	Numerica Performing Arts Center Endowment Fund	\$	200.00	Donor Advised

1/16/2026	Planned Parenthood of Greater Washington and North Id	\$	5,000.00	Donor Advised
1/16/2026	St. Jude Children's Research Hospital	\$	1,500.00	Donor Advised
1/16/2026	Washington State University Foundation	\$	2,500.00	Donor Advised
1/16/2026	Wenatchee High School Band Booster	\$	1,000.00	Agency
1/16/2026	Wenatchee Valley Follies Guild and Children's Foundatic	\$	500.00	Donor Advised
1/20/2026	Alverno College	\$	5,000.00	Donor Advised
1/20/2026	Around the World in 80 Fabrics	\$	5,000.00	Donor Advised
1/20/2026	Ballard Food Bank	\$	500.00	Donor Advised
1/20/2026	Chelan-Douglas Land Trust	\$	100.00	Donor Advised
1/20/2026	Ferndale Food Bank	\$	500.00	Donor Advised
1/20/2026	Friends of the Wenatchee Public Library	\$	7,000.00	Agency
1/20/2026	Methow Valley Nordic Ski Education Foundation	\$	300.00	Donor Advised
1/20/2026	Stage Kids WA	\$	1,000.00	Agency
1/20/2026	The Brighter Futures Foundation	\$	12,500.00	Donor Advised
1/20/2026	Washington's National Park Fund	\$	5,000.00	Donor Advised
1/20/2026	Washington State University Foundation	\$	25,000.00	Donor Advised
1/21/2026	International Rescue Committee	\$	5,000.00	Donor Advised
1/21/2026	KNKX	\$	5,000.00	Donor Advised
1/21/2026	Seattles Union Gospel	\$	3,000.00	Donor Advised
1/21/2026	St. Vincent de Paul Society Agency	\$	50.00	Donor Advised
1/21/2026	Wenatchee Valley Museum and Cultural Center	\$	1,000.00	Field of Interest
1/21/2026	Women's Resource Center Agency Fund	\$	50.00	Donor Advised
1/22/2026	Methow Valley Interpretive Center	\$	2,000.00	Agency
1/23/2026	Wenatchee Valley YMCA	\$	5,000.00	Donor Advised
1/25/2026	First United Methodist Church	\$	325.00	Donor Advised
1/26/2026	Beacon Hill Church	\$	8,000.00	Donor Advised
1/26/2026	Community Aid Network Minnesota (CANMN)	\$	500.00	Donor Advised
1/26/2026	Ecoecho Foundation	\$	2,000.00	Donor Advised
1/26/2026	Fidelity Investments Charitable Gift Fund	\$	100,000.00	Donor Advised
1/26/2026	Judicial Watch, Inc.	\$	500.00	Donor Advised
1/26/2026	The Food Group	\$	500.00	Donor Advised
1/26/2026	Washington Masonic Services	\$	12,053.89	Field of Interest
1/27/2026	North Central ESD	\$	2,000.00	Unrestricted
1/27/2026	Royal Family Kids Camp #207	\$	(500.00)	Unrestricted
1/27/2026	Sage Hills Church	\$	500.00	Unrestricted
1/28/2026	AARP Foundation	\$	100.00	Donor Advised
1/28/2026	Cure Alzheimer's Fund	\$	12,200.00	Unrestricted
1/28/2026	Cure Alzheimer's Fund	\$	9,590.00	Unrestricted
1/28/2026	Doctors Without Borders	\$	63.00	Donor Advised
1/28/2026	Mercy Corps	\$	150.00	Donor Advised
1/28/2026	Methow Recycles	\$	50.00	Donor Advised
1/28/2026	National Park Foundation	\$	75.00	Donor Advised
1/28/2026	Planned Parenthood Federation of America, Inc.	\$	100.00	Donor Advised
1/28/2026	Salvation Army NW Division	\$	100.00	Donor Advised

1/28/2026	The Nature Conservancy	\$	200.00	Donor Advised
1/28/2026	Union of Concerned Scientists	\$	50.00	Donor Advised
1/28/2026	Upper Valley MEND	\$	100.00	Donor Advised
1/28/2026	USA for UNHCR	\$	100.00	Donor Advised
1/28/2026	Wenatchee School District	\$	1,000.00	Field of Interest
1/28/2026	Women's Resource Center of NCW	\$	100.00	Donor Advised
1/28/2026	Woods House Music & Arts	\$	269.50	Field of Interest
1/30/2026	American Civil Liberties Union	\$	500.00	Donor Advised
1/30/2026	Big Stone Foundation	\$	1,000.00	Donor Advised
1/30/2026	Hand in Hand Immigration Services	\$	1,000.00	Donor Advised
1/30/2026	Northwest Public Broadcasting	\$	1,000.00	Donor Advised
1/30/2026	Sierra Club Foundation	\$	500.00	Donor Advised
1/30/2026	Silver Star Search & Rescue	\$	3,000.00	Donor Advised
1/30/2026	Weiser Education Foundation	\$	250.00	Donor Advised
1/31/2026	Akin (formerly Children's Home Society of Washington)	\$	250.00	Donor Advised
2/1/2026	AgForestry Leadership	\$	250.00	Donor Advised
2/1/2026	Celebration Lutheran Church	\$	1,000.00	Donor Advised
2/1/2026	High Country News	\$	100.00	Donor Advised
2/1/2026	Jamie's Place	\$	5,000.00	Donor Advised
2/1/2026	Kyrgyz - Washington Sister Region Organization	\$	500.00	Donor Advised
2/1/2026	Wenatchee Valley YMCA	\$	250.00	Donor Advised
2/2/2026	Brave Warriors NCW	\$	100.00	Donor Advised
2/2/2026	Cove Food Bank	\$	1,000.00	Unrestricted
2/2/2026	Disabled American Veterans Charitable Service Trust	\$	500.00	Donor Advised
2/2/2026	Friends of the Winthrop Public Library	\$	250.00	Unrestricted
2/2/2026	Icicle Creek Center for the Arts Agency Fund	\$	200.00	Donor Advised
2/2/2026	Jamie's Place	\$	150.00	Unrestricted
2/2/2026	Kyrgyz - Washington Sister Region Organization	\$	250.00	Unrestricted
2/2/2026	Little Star School	\$	500.00	Unrestricted
2/2/2026	Memorial Sloan Kettering Cancer Center	\$	150.00	Donor Advised
2/2/2026	Methow At Home	\$	350.00	Unrestricted
2/2/2026	Methow Conservancy	\$	1,000.00	Unrestricted
2/2/2026	Methow Housing Trust	\$	500.00	Unrestricted
2/2/2026	Methow Recycles	\$	150.00	Unrestricted
2/2/2026	Methow Valley Chamber Music Festival	\$	150.00	Unrestricted
2/2/2026	Methow Valley Citizens Council	\$	500.00	Unrestricted
2/2/2026	Methow Valley Community Center	\$	250.00	Unrestricted
2/2/2026	Methow Watershed Foundation	\$	150.00	Unrestricted
2/2/2026	Music Theatre of Wenatchee	\$	100.00	Donor Advised
2/2/2026	Numerica Performing Arts Center Endowment Fund	\$	200.00	Donor Advised
2/2/2026	Room One	\$	1,000.00	Unrestricted
2/2/2026	Salvation Army	\$	500.00	Donor Advised
2/2/2026	Shafer Historical Museum	\$	150.00	Unrestricted
2/2/2026	Special Olympics Washington	\$	200.00	Donor Advised

2/2/2026	The Confluence: Art in Twisp	\$	150.00	Unrestricted
2/2/2026	The Merc Playhouse	\$	150.00	Unrestricted
2/2/2026	Wenatchee Valley Humane Society	\$	100.00	Donor Advised
2/3/2026	Chelan-Douglas Land Trust	\$	250.00	Donor Advised
2/3/2026	Friends of KSPS	\$	1,000.00	Unrestricted
2/3/2026	Northwest Public Broadcasting	\$	1,000.00	Unrestricted
2/3/2026	Partners in Giving	\$	250.00	Donor Advised
2/3/2026	St. Joseph Catholic School	\$	2,000.00	Donor Advised
2/3/2026	Together for Youth	\$	2,700.00	Field of Interest
2/3/2026	Wenatchee Valley Museum and Cultural Center Agency I	\$	5,000.00	Agency
2/3/2026	WETA	\$	1,000.00	Unrestricted
2/3/2026	WETA	\$	1,000.00	Unrestricted
2/4/2026	American Cancer Society	\$	350.00	Donor Advised
2/4/2026	Chelan-Douglas Land Trust	\$	1,000.00	Donor Advised
2/4/2026	Salvation Army - Ray and Joan Kroc Center	\$	200.00	Donor Advised
2/4/2026	Wenatchee Valley Museum and Cultural Center	\$	500.00	Donor Advised
2/5/2026	Consumer Reports Inc	\$	100.00	Donor Advised
2/5/2026	Faith Lutheran Church	\$	850.00	Donor Advised
2/5/2026	Rock Bottom Rocker Pet Pantry	\$	50.00	Donor Advised
2/5/2026	Wenatchee Valley Museum and Cultural Center	\$	500.00	Donor Advised
2/6/2026	Icicle River Middle School	\$	6,000.00	Donor Advised
2/6/2026	Upper Valley MEND	\$	6,100.00	Donor Advised
2/7/2026	Chelan-Douglas Land Trust Endowment for the Future Fi	\$	75.00	Donor Advised
2/9/2026	AdoptTogether.org	\$	3,000.00	Donor Advised
2/9/2026	Chelan Douglas County Volunteer Attorney Services	\$	4,000.00	Donor Advised
2/10/2026	Beacon Hill Church	\$	8,000.00	Donor Advised
2/10/2026	Cashmere Schools Foundation	\$	2,500.00	Donor Advised
2/10/2026	Christ Center	\$	5,000.00	Field of Interest
2/10/2026	Hand in Hand Immigration Services	\$	100.00	Donor Advised
2/11/2026	Beauty of Bronze Agency Fund	\$	100.00	Unrestricted
2/11/2026	Blood Cancer United	\$	100.00	Donor Advised
2/11/2026	Fidelity Investments Charitable Gift Fund	\$	100,000.00	Donor Advised
2/12/2026	Lewis-Clark State College Foundation Inc.	\$	5,000.00	Donor Advised
2/12/2026	Quincy FFA Alumni	\$	8,000.00	Donor Advised
2/12/2026	Wenatchee Valley Museum and Cultural Center	\$	2,500.00	Donor Advised
2/15/2026	Douglas County Historical Society	\$	500.00	Donor Advised
2/15/2026	Haiti Bible Mission	\$	150.00	Donor Advised
2/15/2026	Northwest Public Broadcasting	\$	100.00	Donor Advised
2/15/2026	Wenatchee Valley YMCA	\$	1,000.00	Donor Advised
2/17/2026	Aero Methow Rescue Service	\$	1,700.00	Unrestricted
2/17/2026	Beauty of Bronze	\$	100.00	Donor Advised
2/17/2026	Beauty of Bronze	\$	500.00	Donor Advised
2/17/2026	Cancer Care of NCW	\$	250.00	Donor Advised
2/17/2026	Cascadia Music	\$	500.00	Donor Advised

2/17/2026	Heifer International	\$	1,000.00	Donor Advised
2/17/2026	Numerica Performing Arts Center	\$	250.00	Donor Advised
2/17/2026	Shafer Historical Museum	\$	1,600.00	Unrestricted
2/17/2026	TEAMS Learning Center	\$	49.49	Unrestricted
2/17/2026	UW Foundation to UW Medicine Advancement	\$	1,000.00	Donor Advised
2/18/2026	Wenatchee Valley College Foundation	\$	62,536.45	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	54,982.94	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	65,755.53	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	61,327.20	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	65,977.00	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	56,582.33	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	15,044.17	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	75,490.13	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	49,079.25	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	17,920.22	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	411,267.62	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	29,911.08	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	59,643.25	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	62,739.37	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	13,161.13	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	25,318.71	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	10,723.37	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	42,372.26	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	141,436.70	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	58,817.50	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	13,655.18	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	33,461.00	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	33,758.98	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	585,581.65	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	50,126.32	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	102,028.29	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	44,145.29	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	213,765.99	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	469,647.59	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	1,172,811.78	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	20,857.45	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	43,528.99	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	101,952.91	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	448,512.53	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	45,307.82	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	443,004.67	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	20,336.76	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	222,908.75	AgencyWCF
2/18/2026	Wenatchee Valley College Foundation	\$	46,231.62	AgencyWCF

2/18/2026 Wenatchee Valley College Foundation	\$	86,241.03	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	1,840,575.97	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	144,903.21	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	166,323.89	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	222,956.27	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	225,929.65	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	92,262.90	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	200,958.90	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	36,609.07	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	96,238.00	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	42,381.20	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	98,190.08	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	14,349.36	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	22,657.08	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	170,714.73	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	20,903.32	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	130,688.81	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	41,760.23	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	21,801.07	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	46,866.00	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	12,866.37	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	2,478,931.43	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	75,783.20	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	62,531.48	AgencyWCF
2/18/2026 Wenatchee Valley College Foundation	\$	81,509.91	AgencyWCF
2/18/2026 Women's Resource Center of NCW	\$	2,500.00	Donor Advised
2/19/2026 Center of Family Love, Inc.	\$	1,000.00	Donor Advised
2/19/2026 Numerica Performing Arts Center Endowment Fund	\$	1,470.00	Unrestricted
2/20/2026 Abundant Life Church	\$	5,000.00	Donor Advised
2/20/2026 Bridge of Promise	\$	1,000.00	Donor Advised
2/20/2026 Bridge of Promise	\$	1,000.00	Donor Advised
2/20/2026 Wenatchee Pride	\$	500.00	Donor Advised
2/20/2026 Wenatchee Valley Symphony Association	\$	15,000.00	Donor Advised
2/20/2026 Wenatchee Valley YMCA	\$	1,000.00	Donor Advised
2/21/2026 St. Vincent de Paul Society Agency	\$	50.00	Donor Advised
2/21/2026 Women's Resource Center Agency Fund	\$	50.00	Donor Advised
2/22/2026 Methow Trails Capital Reserve Fund	\$	50,000.00	Unrestricted
2/24/2026 Public School Funding Alliance	\$	500.00	Unrestricted
2/24/2026 Town of Waterville	\$	3,500.00	Donor Advised
2/25/2026 Cancer Care of NCW Endowment Fund	\$	300.00	Donor Advised
2/25/2026 Complete the Loop Coalition	\$	100,000.00	Agency
2/25/2026 Evergreen Mountain Bike Alliance	\$	1,000.00	Donor Advised
2/25/2026 Fidelity Investments Charitable Gift Fund	\$	100,000.00	Donor Advised
2/25/2026 First United Methodist Church	\$	325.00	Donor Advised

2/25/2026 Methow Valley Interpretive Center	\$	2,000.00	Agency
2/25/2026 Northwest Public Broadcasting	\$	120.00	Donor Advised
2/25/2026 Northwest Public Broadcasting	\$	10,000.00	Donor Advised
2/25/2026 Partners in Giving	\$	1,250.00	Unrestricted
2/25/2026 Partners in Giving	\$	950.00	Unrestricted
2/25/2026 Serve Wenatchee Valley	\$	500.00	Donor Advised
2/25/2026 Stephen Siller Tunnel to Towers Foundation	\$	300.00	Donor Advised
2/25/2026 The Association for Frontotemporal Degeneration	\$	200.00	Donor Advised
2/25/2026 Wenatchee Valley Museum and Cultural Center	\$	2,000.00	Donor Advised
2/25/2026 Wenatchee Valley YMCA	\$	250.00	Donor Advised
2/26/2026 Evergreen Mountain Bike Alliance	\$	1,000.00	Donor Advised
2/26/2026 Holy Apostles Catholic Church	\$	1,000.00	Donor Advised
2/26/2026 Knights of Columbus Charities	\$	1,000.00	Donor Advised
2/26/2026 Manson School District	\$	10,000.00	Field of Interest
2/26/2026 Pinnacles Prep Charter School	\$	500.00	Donor Advised
2/26/2026 Wenatchee Confluence Rotary Foundation	\$	375.00	Agency
	\$	14,157,497.78	

MARCH 1 DUE DATE

Alex O. Santillanes

Unrelated: Monica Sanchez

CFNCW: Ana Sanchez

CFNCW: Jane Davis

Alice Malloy Ruud

CFNCW: John Conrad

CFNCW: Lina Conrad

CFNCW: Bonnie Waude

CFNCW: Bob Frey

CFNCW: Janet Frey

Altrusa Club of Wenatchee

CFNCW: Mary Kayser

CFNCW: Angela Harrison

CFNCW: Bertha Sanchez

Andrew Lavagnino

Related: Megan Lavagnino

Related: Melissa Lavagnino

CFNCW: Jasmine Catin

CFNCW: Isaac Cooper

CFNCW: Blair Ellis

CFNCW: Allison Drescher

CFNCW: Mandi Harris

Andrew York Memorial

Unrelated: Daryn Klinginsmith

Unrelated: Josh Draper

Unrelated: Andrew Munro

Arlene Birdsell Martin

CFNCW: John Conrad

CFNCW: Lina Conrad

CFNCW: Bonnie Waude

CFNCW: Bob Frey

CFNCW: Janet Frey

AVHRA Human Resource

Related: Kari Page, AVHRA

Unrelated: Lisa Sharma

Unrelated: Dayna Prewitt

Bob and Nita Paine

CFNCW: Amy Moubray

CFNCW: Craig Field

CFNCW: Christine Jahr

CFNCW: Gavin Garringher

Bob & Valerie Valaas Health Sciences

Related: Peter Valaas

Unrelated: Jane Culp

Unrelated: Suellen Harris

Bob Wildfang - I Will Make A Difference

Donor: Bob Wildfang

Unrelated: Josh Stendera

Unrelated: Marcia Fall

CFNCW: Julie Mott

Brock Lindberg Pi Kappa Phi

Related: Janna Viebrock

Related: Jim Gearhart

Unrelated: Emily Vincent

Unrelated: Denise Anderson

Unrelated: Mike Conrad

Brewster Marin & Brewster Rawson

Per will: CWP Teacher (Todd Phillips)

Per will: HS Counselor (Gina Kelly)

Per will: HS Counselor (Amy Stennes)

Bud and Donna Corbin (Saddlerock)

Related: Amy Roe

Unrelated: Lisa Bozett

Unrelated: Ingrid Miller

Cakes for College

Donor: Ben Paine

Unrelated: Darci Christoferson

Unrelated: Greg Heinicki

Camp Fire

CFNCW: Jasmin Lee

CFNCW: Heaven Henderson

CFNCW: Brooke Jones

Cascade School District ELL

Related: Gro Buer

Unrelated: Mara Bohman

Unrelated: Laurie Peek

Cashmere Rotary

Related: Kirby Reinhart

Unrelated: Nicky Clennon

Unrelated: John Darling

Unrelated: Kelly Boyd

Unrelated: Lindsey Weidenbach

Unrelated: Adi Stedtfeld

Unrelated: Mike Phillips

Cashmere Schools Foundation

Donor: Bob Wildfang

Unrelated: Josh Stendera

Unrelated: Marcia Fall

CFNCW: Julie Mott

Cathryn "Kate" George Frechen

Related: Kay Sparks, donor

Unrelated: Lisa Bartlett - HS Counselor

CFNCW: Allison Nathe

Chelan County Cattlemen's

CFNCW: Shirley Ostenson

CFNCW: Diana Wisen

CFNCW: Paul Wojciechowski

Chelan Cty Fire

CFNCW: Shirley Ostenson

CFNCW: Diana Wisen

CFNCW: Paul Wojciechowski

Clarence & Della Murray

CFNCW: Ede Daniels

CFNCW: Julie Russell

CFNCW: Gene Sharrett

CFNCW: Colleen Frei

CFNCW: Julie Mott

Cone Family

Per agmt: CHS Principal (Brad Wilson)

Per agmt: CHS Counselor (Frank Phelps)

Per agmt: CHS Counselor (Jessica Nygreen)

Per agmt: CHS Counselor (Derek Todd)

Cruz Andrist Memorial

Unrelated: Rebecca Rineda

Unrelated: Jon Conger

Unrelated: Anh Jones

Unrelated: Becki Andrist

unrelated: Crystal Sheets

David M Bohr Memorial Baseball

CFNCW: Jenny Brooks

CFNCW: Liz Marlow

CFNCW: Jenna Pagila

deRubertis Family

Staff Member: Nancy Neiderstadt

Admin Staff: Lyn Courtois

Counselor: Marcia Fall (chair)

Staff Member: Andy Groce

Doell Family

Donor: Ian Doell

CFNCW: Kirk Snyder

CFNCW: Angela Collins

Don and Rita Campbell

Related: Rita Campbell

Related: Laurence Campbell

Unrelated: Sarah Lane

Unrelated: Rylan Weythman

Dorothy Prewitt Pohlman / AAUW

CFNCW: Caiti Velazquez

CFNCW: Lael Duncan

CFNCW: Joyce Johnson

Douglas Cty Waste Mgmt

CFNCW: Gloria Van Buren Hainline

CFNCW: Betsey Stahler

CFNCW: Laurie Shorett

Dr. N K Bhide Band

CFNCW: Cari Hammond

CFNCW: Natalie Hoback-Noyd

CFNCW: Mary Thompson

Dr. Patrick Molloy Migrant

CFNCW: Kim Neher

CFNCW: Allison Neher

CFNCW: Martha Von Reis

Entiat Scholarship Foundation

Unrelated: Brenda Lamb, former member

Unrelated: Cindy Herdt, former member

Unrelated: Darcey Dahl, former member

Eric DePersio Memorial

Related: Pam DePersio

Unrelated: Danielle Bailey, friend

Unrelated: Tammi Meade

Everett & Roy Hill Music

CFNCW: Susan Huffman

CFNCW: Alex Weirich

CFNCW: Rebecca Johnson

Ferguson Family

Related: Roy Ferguson, donor

Unrelated: Joe Kitzman

Unrelated: Michael Knopf

Fern Cousineau Duncan Art

Unrelated: Carla Wilson

Unrelated: Rainn Wilson

Unrelated: John Barrett

Unrelated: Javid Freeman

Unrelated: JoAnn Walker

Ferne Daniel

Per agmt: EHS Principal (Aaron Cummings)

Per agmt: EHS Counselor (Jay Mills)

Per agmt: EHS Teacher (David Tempel)

Follow Your Dreams (CSF)

Donor: Bob Wildfang

Unrelated: Josh Stendera

Unrelated: Marcia Fall

CFNCW: Julie Mott

Fisk & Lila Gerhardt

Unrelated: Lynda Jammerman

Unrelated: Jay Sparks, Elks

CFNCW: Katja Myrene

Gerald E. Robinson

CFNCW: Holly Thorpe

CFNCW: Libbey Siebens

CFNCW: Maria Iniguez

Gene 'Sarge' Huber Band

Related: June Huber, donor

Unrelated: Linda Haglund

CFNCW: Beth Stipe

Gil and Kay Sparks

Related: Kay Sparks

Unrelated: Julie Robinson

Unrelated: Steve Robinson

CFNCW: Bruce Keleman

Grace Motteler Ekman Whitley

Related: Robin Baker, donor

CFNCW: Mary Murphy (chair)

CFNCW: Susan Huffman

Hal Newman Memorial Music

CFNCW: Kim Neher

CFNCW: Allison Neher

CFNCW: Martha Von Reis

Harry & Kathern Lovejoy - 6/1

Unrelated: Larry Schreck
Unrelated: Robert Turner
Unrelated: Sherry Schreck

Henry Galbraith / East Wenatchee Grange

CFNCW: DJ Dorey
CFNCW: Andie Johnson
CFNCW: Kelly Stewart

Howard and Beverly Murray Memorial

Unrelated: Ivy Murray
Unrelated: Michelle Straus
Unrelated: Joanne Stekler

J.D. Riggs Memorial

Unrelated: Holly Thorpe
Unrelated: Libbey Siebens
Unrelated: Russ Hemphill

JDSA Law

Related: Evan McCauley
CFNCW: Bob Bugert
CFNCW: Katie Tackman

Jack & Dede Hill - WSU

Per agmt: Principal (Eric Anderson)
Per agmt: Athletic Director
CFNCW:

James Elwyn Memorial

CFNCW: Karen Rutherford
CFNCW: Peter Rutherford
CFNCW: Ann Sonn

Jerry Van Winkle Memorial

CFNCW: Gene Dowers
CFNCW: Betsey Stahler
CFNCW: Jenna Pagilia

Joan and George Smith

Related: Kay Sparks
CFNCW: Lisa Bartlett
CFNCW: Sarah Lane

John and Elnora Smith

Unrelated: Faviola Barbosa
Unrelated: Bethany Thrasher
Unrelated: Thom Kokenge

John and Mary Martin

Unrelated: Steve Smith
Unrelated: Steve Dorsey

Unrelated: Steve Tidd

Unrelated: Chuck Hammond

Unrelated: Brent Biggar

Josh Putman Memorial

Related: Dolly/Richard Buckingham

Unrelated: Rebecca Smith - teacher

Unrelated: Bob Busk

Unrelated: Lisa Murphy - friend / co-worker

Junior Hamilton Memorial Baseball

Related: Dan Hamilton

Unrelated: Dalton Thomas

Unrelated: Josh Ervin

Unrelated: Eduardo Hamilton

Junior Hamilton Memorial Mariachi

Related: Faby Hamilton

Unrelated: Izzy Tapia

Unrelated: Eduardo Cortes-Selorio

Unrelated: Ryko Hamilton

Katie and Steven Rolfs Memorial

Per agmt: CHS Principal (Brad Wilson)

Per agmt: CHS Counselor (Jessica Nygreen)

Per agmt: CHS Counselor (Derek Todd)

Per agmt: CHS Teacher (Frank Phelps)

Katie Moore Memorial Scholarship

Related: Sarah Moore

Related: Steven Moore

Unrelated: David Cook

Unrelated: Kathy Hamlett

Unrelated: Dede Vernon

Kellen Biggar Athletic - 4/1

Donor: Chris & Rod Biggar

Unrelated: David Stoddard

Unrelated: Cheryl Sanford

Keyes Fiber

CFNCW: Shirley Ostenson

CFNCW: Mario Reyes

CFNCW: Kirk Snyder

Lauren Ludeman Memorial

Unrelated: Jenni Bishop

Unrelated: Becci Peipel

Unrelated: Jill Moomaw - WHS counselor (chair)

Lee Bofto

Unrelated: Jerry Jefferson
Unrelated: Steven Sears (chair)
Unrelated: Scott Shales
Unrelated: Terry Story

LeMaster/Auvil

Unrelated: Eldene Wall
Unrelated: Jan Merriman
Unrelated: Millie Watkins
Unrelated: Robin Gahringer
CFNCW: Merry Roy

Linda Safar Memorial

Related: Safar daughters (Annie, Katherine, and Meryl)
Unrelated: Audry Getinger
Unrelated: Chelsea Carlson
CFNCW: Joanne Roberts

Marjorie & William Griffin

Related: William Griffin
CFNCW: Mark Spurgeon
CFNCW: Russ Speidel

Marlene & Henry Bauer

CFNCW: Carolyn Griffin-Bugert
CFNCW: Janet Stutzman
CFNCW: Beverly McCreary

Melonye Shurtz Memorial

CFNCW: Jessica Kelly
CFNCW: Jane Rohman
CFNCW: Alfred Adan

Mel & Lyndell Crowder Horticulture

Related: Linda Batch / Jackie Griffiths, family
CFNCW: Rob Jorgensen
CFNCW: Denise Sorom

Neil & Harold Asmussen

Per Agmt: Clint Wall
Per Agmt: Tyler Caille
Per Agmt: Bruce Todd

Nic Tower Memorial

CFNCW: Anne White
CFNCW: Renee VanBuskirk
CFNCW: Robert White

Nick Schoffen Music

CFNCW: Christ White
CFNCW: Jane Rohman

CFNCW: Karen Kjobech

Ogburn Family

CFNCW: Brian MacPherson

CFNCW: Audrey Bessonette

CFNCW: Jodi Lowe

CFNCW: Kathy Traynor

Okanogan Masonic Lodge

Related: Blaine Sullivan

Unrelated: Ashley Goetz

Unrelated: Jodi Deroser

Pateros

Unrelated: Melissa Tibbs (chair)

Unrelated: Jody Coles

Unrelated: Geoffrey Hiltz

Unrelated: Allison Cornwall

Paul Reasor Memorial

Related: Brett Reasor, family

Unrelated: Bruce Henne

CFNCW: Mark Spurgeon

Peters Family

CFNCW: Jennifer Korfiatis

CFNCW: Kyra Davis

CFNCW: Michelle Rhyner

Ralph and Clara Betcher

Unrelated: Ric Bayless, MHS Counselor

Unrelated: Jill Moomaw, WHS Counselor (chair)

CFNCW: Celia Cummings

Robert Wilson Art

Related: Carla Wilson

Related: Rainn Wilson

Unrelated: John Barrett

Unrelated: Javid Freeman

Unrelated: JoAnn Walker

Ramiro Cortez

CFNCW: Susan Huffman

CFNCW: Alex Weirich

CFNCW: Rebecca Ryker-Johnson

Ronald Estes Memorial

Related: Andera Estes, donor

Unrelated: Herb Sherburne, friend

Unrelated: Linda Sherburne, friend

Rowland and Ethel Slusser Jones

Related: Marcia Webb
Unrelated: Ann Whitehall
Unrelated: Linda Daling

Roy Hill Music

Unrelated: Susan Huffman
Unrelated: Alex Weirich
Unrelated: Rebecca Johnson

Rudolph and Carolyn Christianson

CFNCW: Ede Daniels (chair)
CFNCW: Kristi McMaster
CFNCW: Margaret Dreisigner
CFNCW: Julie Mott

Saddlerock Presbyterian Church

Related: Amy Roe, Chair of church committee
Unrelated: Ingrid Miller
Unrelated: Liza Bozett

Second Chance

Unrelated: Julie Mott
Unrelated: Karen Rutherford
Unrelated: Betsy Cushman

Silver Star

Unrelated: Rachel Krebs
Unrelated: Lawrence Hill
Unrelated: Ken Neher

Sons of Italy

Unrelated: Jerry Pipitone
Unrelated: Diane Garlini
Unrelated: Kathy Porrevecchio

Stella Knobel & Mary Jean Carter

CFNCW: Kathy Podmayer
CFNCW: Jane Rohman
CFNCW: Amy Roe

Stella Knobel / Saddlerock Pres. Church

Related: Amy Roe, Chair of church committee
Unrelated: Ingrid Miller
Unrelated: Liza Bozett

Tanner Perry Memorial

Related: Cathy Perry
CFNCW: Robin Fowler
Unrelated: Angelicia Garcia-Macias

Vets Serving Vets - 6/1

CFNCW: Mary Murphy

CFNCW: Anastasia O'Brien

CFNCW: Kriss Crilly

Virgil & Pearl Gustin

Unrelated: Marcia Henkle - Chair

Unrelated: Doug Tanneberg

Unrelated: Linda Daling

Waterville Shocker

Unrelated: Kasey Edgar

Unrelated: Teagan Peterson

Unrelated: Kasey Dirk

Wenatchee Bowling

USBC Member: Beth Little

USBC Member: Debbie Thune

Unrelated: Chris Dugan

Unrelated: Lloyd Smith

Wenatchee Exchange Club

Related: Jason Underwood

Unrelated: Amber Crawford

Unrelated: Kelly Underwood

Unrelated: Ray Ruiz

WHS Alumni Foundation

CFNCW: Denise Figlewicz

CFNCW: Jennifer Witherbee

CFNCW: Beverly McCreary

WHS Class of 1952/Lovejoy

Related: Lynn Heminger, WHS Class of 1952

CFNCW: George Wendell

CFNCW: Mack Parkhill

Wenatchee Kiwanis

Related: Doug Head, Kiwanis Chair

Unrelated: Bill Dearing

Unrelated: Judy Dubuque

Unrelated: Ann McIntosh

Unrelated: Lauren Head

Wenatchee Rotary

Unrelated: Marcia Henkle

Rotary: Joe St. Jean

Unrelated: Sandy Lewis-Schuster

Unrelated: Claudia Robles

Unrelated: Roberta Alley

Unrelated: Alfredo Martinez

Unrelated: Mark Woolsey

WV Street Rods

WWSR: Sam Profit

CFNCw: Ethan Brookover

Unrelated: Don Brawley

CFNCW: Paul Wojciechowski

Wenatchee Women's Bowling

USBC Member: Beth Little

USBC Member: Debbie Thune

Unrelated: Chris Dugan

Unrelated: Lloyd Smith

William and Elizabeth Robinson

Donor: Steve Robinson

CFNCW: Mary Ellen Wybenga

CFNCW: Susan Huffman

Women's Service League of Wenatchee

Unrelated: Leslie Freytag

Unrelated: Mary Kay Larson

Unrelated: Connie Anderson

Unrelated: Pam St. Laurent

Zur Hausen

CFNCW: Frank Kunz

CFNCW: Darren Goehner

CFNCW: Heidi Zutter

APRIL 1 DUE DATE

Edna Fast Maguire Kappa Delta Sorority

Jeanie Vahlsing & Virginia Fast

Karen Arseneault

Gary Arseneault

Edna Fast Maguire WSU School of Veterinary Medicine

Jeanie Vahlsing & Virginia Fast

Karen Arseneault

Gary Arseneault

Marvin & Frances Salisbury - 4/1

Related: Craig Reese

CFNCW: Earl Crowe

CFNCW: Julie Mott

Mission - 4/1

Related: Molly Nelson

Unrelated: Traci Faulkner

Unrelated: Glen Carlson

Nat'l/Welch's Fred Killian Memorial - 4/1

CFNCW: Claudia DeRobles

CFNCW: Bethany Thrasher

CFNCW: Jessica Kelly

Susan Yaw Memorial - 4/1

Related: Bob Yaw

CFNCW: Jane Hensel

CFNCW: Joan Flemming

JUNE 1 DUE DATE

James Wharton First Choice Collision - 6/1

Related: Allen/Kim Tangeman

Unrelated: Jason Stroschein

Unrelated: Ed Gardner

The Steiner Family - 6/1

CFNCW: Scooter Harter

CFNCW: Rebecca Wright

CFNCW: Rosa Cruz

Sybil Shearer Nursing - 6/1

CFNCW: Shayne Magdoff

CFNCW: Ron Feld

CFNCW: Annie Coghlan

Bolyard Family Nursing - 6/1

CFNCW: Peter Valaas

CFNCW: Kay Sparks

CFNCW: Ron Feld

Dr. Steven G. Kerr Memorial Medical - 6/1

CFNCW: Peter Valaas

CFNCW: Abril Lope

CFNCW: Cici Asplund

Don Fager - 6/1

CFNCW: Jill Thompson

CFNCW: Donna Parsons

CFNCW: Annie Sirguy

NCW Nursing - 6/1

CFNCW: Emily Scovill

CFNCW: Keely Sieg

CFNCW: Emily Siroky

Robert & Barbara Alexander Nursing - 6/1

CFNCW: Emily Scovill

CFNCW: Keely Sieg

CFNCW: Emily Siroky

Native Daughters - 6/1

CFNCW: Peter Valaas

CFNCW: Kathy Podmayer

CFNCW: Ron Feld

Paul and Karen Pugh - 6/1

CFNCW: Shayne Magdoff

CFNCW: Ron Feld

CFNCW: Annie Coghlan

Pete and Mary Houck - 6/1

Related: Peter Houck

Unrelated: Peter Valaas

Unrelated: Adela Valaas

Unrelated: Cici Asplund

Eddie Bromiley Memorial - 6/1

Related: Laura Bromiley

Unrelated: Stasha Reed

Unrelated: Vern Matthews

Unrelated: Eric Steele

Inga, Magnus and Knute Bakke - 6/1

Richard Buckingham

Dennis Pendleton

Ken Marson

Richard "Obie" Oberweiser

Related: Ivy Murray

Unrelated: Dan Ritzke

Unrelated: Niekol Hall

F.H Vincore

CFNCW: Claire Oatey

CFNCW: Cindy Goodell

CFNCW: Mary Conley

Carol Cooper

Related: Les Cooper

CFNCW: Elaine Thompson

Related: Blaire Cooper

CFNCW: Patty Murphy

CFNCW: JoAnn Dennis

Kathryn Lodge

Ron & Jeanne Lodge

Sara Evans

Gretchen Woods

Lewis Schuster Rock Island

Sandy Schuster

Matt Wisen

Melissa Wisen

Robert Rector

Judy Rector
Patricia Betzing
Robbette Schmit

WR Bill Asplund

Susan Rankin
Vivian Sarles
Ashley Kunz

Bob Christopher

CFNCW: Chyvonna Torres
CFNCW: Teri Tucker
CFNCW: Annie Sirguy

ES Johnson/Dr. Jay Eller

Margaret Wetherbee
Jessica Kelley
Maireya Castillo

Wenatchee Valley Medical Group

Dan Kerr
(Jazmine Perez)
(Brenda Baumiester)
(Amy Unwin)
(CJ Pierce)
Renee Monson
Julie Gann

Thomas J. Nelson SR

Angie Harrison
Robin Moser
Gene Dowers

Robert Graves

Jody Graves
Russ Hepler
Matthew Kimmel
Susan Kimmel
Courtney Waller

Lane Johnson Memorial

Related: Sharon Johnson
Unrelated: Greg Lovercamp
Unrelated: Brett McDonald

Rich Pratt

Related: Judy Nelson
Unrelated: Sharron Pitts
Unrelated: Gordon Pitts

Cancer Care - Betsy Tontini

Related: Daniela Dickson, Board Member

Unrelated: Gale Dix

Unrelated: Tracy Thompson

Sharon Paine

CFNCW: Amy Moubray

CFNCW: Craig Field

CFNCW: Christine Jahr

CFNCW: Gavin Garringer

Don & Ellen Garrison

CFNCW: Robert Garrison

CFNCW: Erin Radke

CFNCW: Zach Spate

Lucas Banks 6/1

Related: Michael Banks

CFNCW: Pam Brulotte

CFNCW: Devin Zimmer

John & Peggy Kalahar

Related: Kory Kalahar (family)

CFNCW: Christine Morgan

CFNCW: Lindsay Welfelt

Mary Ann Ford Nursing 6/1

Related: Tami Lopcishinsky

CFNCW: Maggie Richter

CFNCW: Jennifer Martin



CFNCW Marketing, Development & Communications Committee Meeting Minutes

Date: January 8, 2026

Time: 2:00 – 3:30 pm

Location: Hybrid (Wenatchee office & Zoom)

Attendees: Thom Schroeder, Denise Sorom, Pam Brulotte, Karen Nichols, Ashley Lodato, Jen Jorgensen, Lauren Loeb sack, Gabriela Perky

1. Call to Order (Thom)

- Welcome and Happy New year.

2. Development Updates (Thom)

New Funds & Financial Highlights

- 25 new funds opened halfway through FY2026: 13 Donor-Advised Funds, 5 Agency Funds, 3 Designated Funds, 2 Scholarships, and 2 Field of Interest Funds.
- FY2025 total funds opened: 29; FY2024 was a larger year at roughly 40 funds.
- Contributed income: 10-year average of ~\$8M/year; ~\$8M raised in the last two months alone.

Donor Stewardship & Impact Reporting

Planned stewardship touchpoints for 2026 include:

- January/February impact reports to donors who give to unrestricted/administrative/legacy-support funds and to next-generation stewards of designated funds
- March/April Annual Report led by Marketing;
- late fiscal-year impact reports tailored to each regional legacy fund focusing on current-year grantmaking
- September Partners in Giving (PIG) impact report.
- Thom emphasized closer collaboration with Marketing this year so donor communications carry a cohesive voice and emerging story themes across channels.

Give 10 Campaign – Refresh ("Give 10 2.0")

- With 2026 marking the 40th Anniversary, the Foundation will refresh the Give 10 campaign.
- Original campaign promoted leaving 10% of one’s estate to community causes. Now, with nearly 200 Heirloom Society members and many realized legacy gifts, the refresh will shift from awareness to evidence—showcasing actual legacies at work and inviting donors to join a growing movement.

3. Marketing Report

Give NCW 2025 Results (Preliminary)

- Total raised: approximately \$1,080,000 across 98 participating nonprofits (final tally pending).
- About 3,000 total donations; ~750 gifts at the \$10 level (on-ramp gifts).
- Average gift increased year-over-year; ~530 new donors reported by system metrics.
- Roughly 30% of dollars via online giving; ~50% via internal donor-advised funds (DAFs).

Announcement (Creative Concept) Event

- Planned public reveal features a large-scale, floor-assembled print (approx. 15’ x 30’) captured in a time-lapse video. The image will gradually “build” to reveal the seven-figure total, culminating in a celebratory paper toss with nonprofit partners. Nonprofits and committee members were invited to participate in the filming at Pybus.

4. Discussion Topics

Give to All Fund – Role, Messaging, and Balance

- Estimated Give to All distribution this cycle is roughly \$1,700 per organization (98 orgs), representing a meaningful boost for smaller groups that just meet the \$1,000 threshold.
- Donor profiles for Give to All often include: (a) new-to-community or second-home donors (e.g., Seattle-to-Methow) who want broad impact while learning the landscape; and (b) donors who prefer fewer mailings and a streamlined annual gift.
- Committee weighed visibility vs. competition: promoting Give to All can simplify giving and increase equity but should not crowd out nonprofit-directed gifts. Methow experience shows a practical control—capping Give to All match so groups cannot receive more from the pool than they raise on their own.
- Actionable messaging opportunities: clarify that the Foundation covers all campaign administrative costs and credit card fees—so every donated dollar passes through—while Give to All can further increase impact.

Donor Education & Marketing Opportunities

- Address misconceptions that giving through the Foundation reduces impact; emphasize fee coverage and added leverage (e.g., Give to All, campaign matches).
- Use donor and board testimonials to demonstrate that routing gifts through the campaign does not preclude direct relationships with nonprofits; it can, in fact, enhance them.
- Strengthen grassroots amplification: provide an advance social calendar and shareable assets for boards and participating nonprofits; encourage daily/weekly shares beyond Funday Monday.

- Explore targeted paid social to reach second-home owners, frequent visitors, and younger donors, while maintaining strong organic strategies.

Targeted Matching Gifts Pilot – Food Security Use Case

- A donor couple gave \$50,000 to provide eight \$6,000 challenge matches across smaller food-security organizations (e.g., local food banks, youth meals).
- Each participating organization met the match quickly, indicating strong donor responsiveness when a clear target is set.
- Committee cautioned against introducing many sector- or org-specific matches during Give NCW due to messaging complexity and equity concerns; recommended limiting targeted pilots or off-cycle opportunities.

5. Q1 2026 Marketing Priorities & Additions

- 40th Anniversary: Frame as both celebration and awareness campaign— “What is a community foundation?”—with historic artifacts (e.g., original founding news clipping) and forward-looking impact narratives.
- Website: Address broken links, and content gaps; align navigation with key audiences (donors, nonprofits, advisors, students).
- Email: Clean high bounce segments; define audience segments and cadence; leverage ~900 December sign-ups to test welcome/onboarding series.
- Project Management: Establish a year-round marketing calendar to reduce reactive work and align cross-team production.
- Audience Growth: Elevate outreach to under-aware segments—young donors, part-time residents/second-home owners—and continue education on legacy giving and DAFs.

6. Adjourn/Key Dates

- Donor Appreciation Event at Pybus: April 29, 2026
- **Next Meeting:** March 12, 2025 /2:00-3:30 pm



CFNCW Executive Committee Meeting Minutes

Date: 1/9/26 - Time: 8:00 – 9:00 am

Attendees:

In person: Beth Stipe, Chris Goetz, Steve Wright, Jeff Ostenson

Zoom: Megan Collyer, Karen Rutherford, Diane Blake

1. Monthly Operating Budget Review

- Admin revenue significantly exceeded projections, boosted by strong donor activity and the 1.5% scholarship fund fee.
- Admin fee revenue through December totaled \$922,000.
- Expenses remain below projections until the Director of Finance & Operations is hired.
- Overall financial position remains strong with a substantial operating surplus.

Fund Growth & Gifts

- Expected new gifts totaled \$8.5M; actual receipts exceeded \$20M and may reach \$25M.
- Fund creation increased from 22 last year to 29 this year.

YMCA Camp Endowment Gifts

- Widener contributed \$2M and secured a \$10/year lease-back agreement for the YMCA camp.
- An additional donor contributed \$3M for Outdoor Recreation programming.
- Total new YMCA endowments: \$5M.
- Funds will expand recreation programs, equipment access, and partnerships.

Loan Program Updates

- Two ARP loans were repaid in full, including Sustainable NCW.
- Program continues to effectively support nonprofit stability.

Donor Behavior & Giving Trends

- QCD gifts increased significantly, with CFNCW using giving-card mechanisms to distribute funds.
- Commercial DAF restrictions (Fidelity, Vanguard) are driving donors toward CFNCW.

Marketing & Communications

- Give 10 campaign to undergo complete redesign.
- Integration with Heirloom Society (now 200 members).

- Focus on building unrestricted funds for equitable community support.

2. Director of Finance & Operations

- Murdoch Grant awarded: \$331,000.
- Five applicants (mostly out-of-area, advanced degrees); one local.
- Interviews to begin; committee assistance requested.

3. Executive Director Transition Planning

- Beth plans transition within 2026–2028.
- Two committees to be formed: Transition Committee and Hiring Committee.
- Betsy Cushman nominated as Transition Committee Chair; Leslie recommended as member.
- Communication strategy needed to balance transparency and donor confidence.
- Board development will be key to a smooth leadership transition.

4. January Trustee Meeting Agenda Review

Investment & Budget Planning

- Verus and Badgley to provide high-level investment updates at next meeting.
- March meeting to include budget modeling and spending policy alignment.
- Goal: strengthen board financial literacy.

Program & Policy Updates

- Scholarship program updates scheduled for next meeting.
- Board to review donor request to restrict an unrestricted gift retroactively.

Give NCW Campaign Results

- Record-breaking \$1.085 million raised.
- First campaign to exceed \$1M; celebration planned.

Facilities Update

- Painting and remodel underway.
- Awaiting furniture budget to determine full repaint.

5. Adjournment

Next meeting: February 13, 2026, 8:00 – 9:00 am



CFNCW Finance and Investment Committee Meeting Minutes

Date: 01/09/26 - Time: 11:30 am – 1:00 pm

Attendees:

In person: Steve Wright (Chair), Beth Stipe, Jeff Ostenson, Colleen Frei

Zoom: Don Linnertz, Kevin Rieke, Jesus Hernandez

1. Review of Financials

Review of Financials (as of 12/31/2025 – FY26 Mid-Year)

Statement of Activities:

- Donations for the first six months of FY26 exceeded \$22M, significantly above the 10-year average of ~\$8.5M.
- December alone brought in nearly \$9M, driven partly by two large endowed gifts to the YMCA totaling \$5M.
- Stock gifts were strong starting in October, which is earlier than typical year-end giving patterns.
- Interfund gifts (e.g., DAF → scholarship, Partners in Giving → GiveNCW) are excluded in audits to prevent double counting.
- Approximately \$11M in grants had been issued by mid-year, with over \$1M queued for January.

Statement of Financial Position:

- Total assets reached \$198.98M, placing the Foundation within \$1M of the \$200M milestone.
- Liabilities totaled \$75M, and the widened asset–liability spread indicates increased long-term stability.
- Some members did not receive the Statement of Financial Position; staff will resend.

2. Operating Reserve & Opportunity Fund

- Reserve policy requires holding 50% of the annual operating budget in cash or money market accounts (~4% yield).
- The Opportunity Fund consists of reserves above that required threshold.
- Current mid-year operating surplus is approximately \$200K, which will be added to reserves at fiscal year-end.
- A 25% default reserve (~\$750K) is set aside for the Impact Investing Fund.

- Discussion noted that reserves may now exceed both the required 6-month cushion and stress-case levels, suggesting a review of investment strategy for excess funds.

3. Agency/Advised Funds & Donor Messaging

- CFNCW manages withdrawable agency/advised funds to support nonprofit partners that lack investment capacity.
- Nonprofits are advised to invest only funds not needed within 36–48 months to avoid risk during downturns.
- Large agency partners, such as the college foundation (~\$13M), contribute to stability.
- Donor messaging emphasizes collective leverage and the benefits of using donor-advised funds, including matching and pooled impact.
- The Give 10 program will undergo a branding and messaging refresh, timed alongside the approach to the \$200M milestone.

5. Pro Forma (10-Year Forecast)

- Corpus grew from ~\$160M to ~\$199M over 18 months, significantly improving long-term projections.
- Key assumptions include an \$8.6M annual gifts baseline, ~7.93% long-term market return, ~5.67% consistent spending policy, and ~1.2% combined fees.
- The Good Grows Here Fund (~\$8.1M) continues to fully distribute its 5% spending policy allocation to programs annually.
- The Opportunity Fund is projected to grow to ~ \$2M within 10 years, even under conservative growth assumptions.
- Stress test scenarios modeled a one-third market decline; reserves were sufficient to maintain operations without staff cuts.

6. Programs & Initiatives

- The Leadership Program costs approximately \$120K and receives ~\$50K in partner support, with an expectation of becoming self-sustaining.
- The OMAK/Okanogan office remains incorporated into the operating budget.
- The Murdoch Grant (\$330K) supports the Director of Finance role and is integrated into FY26 financial planning.

7. Staffing & Hiring – Director of Finance & Operations

- The position is essential for financial oversight, compliance, operations management, and donor engagement.
- Ideal candidate would hold CPA credentials or comparable financial expertise with strong communication skills.
- Applicant pool currently includes candidates from municipal, nonprofit, legal, and administrative backgrounds.
- Committee members interested in participating in the hiring process should contact Beth.

8. Impact Investing Program Update

- There are currently 4–5 active loans totaling ~\$1.8M, with ~\$1.2M remaining available to lend.

- Two loans (Sustainable NCW and Okanogan County Housing Association) have been fully repaid; another is expected in Q1.
- Staff will begin producing regular dashboards to track loan metrics as the program transitions from pilot phase to full launch.

9. Decisions & Consensus

- Prepare communications for the imminent \$200M milestone.
- Conduct review of reserve needs and potential investment strategy adjustments.
- Maintain Impact Investing Fund balance at \$3.4M until an additional \$400K is received.
- Move forward with Give 10 refresh and impact investing program enhancements.

10. Adjournment

Next Meeting: February 13, 2026, 11:30-1:00 pm (Zoom Only)



January Board of Trustees

Meeting Minutes

Tuesday, January 20, 2025

5:30-7:00 pm

CFNCW Office/Zoom, Wenatchee WA

Mission:

The Community Foundation of NCW grows, protects and connects charitable gifts in support of strong communities.

BOARD MEMBERS PRESENT:

Jaci Bayless		Jesus Hernandez	x	Karen Rutherford	x
Diane Blake	x	Jen Jorgensen	x	Claudia Shipman	
Pam Brulotte	x	Don Linnertz	x	Randy Smith	
Megan Collyer	x	Ashley Lodato	X	Josh Stendera	
Lester Cooper	x	Lauren Loeb sack		Rylan Weythman	x
Colleen Frei	x	Evan McCauley	x	Rufus Woods	
Leslie Freytag	x	Karen Nichols	x	Rick Wray	x
Chris Goetz	x	Rosario Nystrom		Steve Wright	x
Alejandra Gonzalez		Jeff Ostenson	x		
		Kevin Rieke	x		

STAFF PRESENT:

Beth Stipe, ED	x	Denise Sorom	x	Julie Mott	x
Gabriela Perky	x	Claire Oatey	x	Annie Sirguy	x
Thom Schroeder	x	Melissa Wisen	x		

GUEST(S) PRESENT:

Russ Speidel	x	Victor Lee, Versus Company	x
David Bensten		Katie Wham, Badgley Phelps	x

1. Call to Order (Jeff Ostenson):

- Jeff started the meeting with presentation of guests, Victor Lee of Verus Advisory, Inc. and Katie Wham of Badgley Phelps Wealth Managers. Victor and Katie provided overview of their support to the Foundation.

Versus Investment Presentation – Victor Lee

Victor Lee provided a comprehensive overview of Verus and the Community Foundation's investment performance.

Key Highlights:

- Verus mission: *Stewards of the means to a better life*
- 40th anniversary of Verus (founded January 20)
- Advises over \$1 trillion in institutional assets; ~\$82B in nonprofit assets
- Strong client retention: ~66% of clients with Verus for 10+ years

2025 Portfolio Performance:

- Overall portfolio return: **~14%**
- Strong equity performance, including international equities (**~31%**)
- Fixed income returned approximately **8%**
- Money market yields ~4.2%

Governance & Oversight:

- Portfolio remains fully within Investment Policy Statement (IPS) ranges
- 10-year annualized return: **~9.2%** vs. policy benchmark ~9%
- Peer comparison places the Foundation in the **top quartile (15th percentile)**
- Portfolio growth from ~\$60M (10 years ago) to ~\$156M+ as of Q3
- Majority of managers rated "green" on watch list
- Transparent and competitive fee structure

Discussion:

- Board expressed appreciation for the strong performance and disciplined, simple portfolio design
- Noted success without heavy use of alternative investments

Badgley Phelps Investment Presentation – Katie Wham

Katie Wham reviewed performance of individually managed funds, including AZ Wells Foundation and Charitable Remainder Trusts.

Key Highlights:

- AZ Wells portfolio gained **~\$2M in 2025 (~14%)**
- Ending market value approximately **\$16.5M**
- Portfolio growth of **~\$4.9M over five years**
- Diversified allocation using low-cost equity ETFs and individual bonds
- Emphasis on long-term investing, discipline during market volatility, and adherence to IPS

Market Commentary:

- Market near all-time highs, driven by technology, AI, and improving interest rates
- Continued optimism balanced with caution around geopolitical and regulatory risks

Discussion:

- Board noted alignment between Verus and Badgley Phelps despite independent operations
- Appreciation expressed for stewardship of charitable remainder trusts and income-producing assets

2. Investment Policy & Alternatives Discussion

- Board discussed alternative investments (hedge funds, private equity, REITs)
- Alternatives reviewed historically; concerns include:
 - Higher fees
 - Delayed reporting complicating audits
- Consensus reaffirmed: current simple, cost-efficient portfolio is performing exceptionally well
- Discussion highlighted long-standing, competitive consultant fee arrangements
- Acknowledged strong value and analytical support relative to cost

3. Consent Agenda (Jeff Ostenson)

Financials

- Total assets near **\$199M**
- Fiscal year-to-date gifts: **~\$22M** (significantly ahead of pace)

Grants

- Grants distributed: **~\$10M** in first six months
- Continued shift toward more permanently endowed funds vs. agency funds

Approval of minutes for:

- November 13, 2025 Marketing, Development and Communications Committee
- November 14, 2025 Executive Committee
- November 14, 2025 Access to Rural Capitol (ARC) Committee
- November 14, 2025 Investment Committee
- November 18 2025 Trustee Board Meeting
- December 16, 2025 Programs Committee

Motions & Votes:

- **Motion:** Approve the Consent Agenda
- **Second:** Motion was seconded by Don Linnertz and Steve Wright.
- **Vote:** Unanimous approval.

4. Program Updates

A. Give NCW Campaign Results (Thom Schroeder, Gabriela Perky, Denise Sorom)

- Total raised: **\$1,085,414.61** (first time exceeding \$1M)
- 20% increase over prior year
- 98 participating nonprofits
- Average donation increased ~10%

- New donors increased ~**40%** year-over-year

Discussion Highlights:

- Board celebrated Give NCW as a major milestone and community achievement
- Emphasis on Give NCW as an accessible entry point for philanthropy ("on-ramp to giving")
- Recognition of strong nonprofit participation and peer-to-peer donor engagement
- Campaign video highlighting success was presented

Data & Trends Reviewed:

- Majority of donations under \$250, reflecting broad community participation
- Large gifts (\$1,000+) accounted for a significant share of total dollars raised
- Strong donor participation from Wenatchee Valley
- Increased utilization of internal Donor Advised Funds (DAFs)

Theme for 2026:

- **Hyperlocal** – reinforcing the Foundation’s deeply local mission and messaging during its 40th anniversary year

B. Scholarship Program Updates (Julie Mott)

- Staff provided an update on the Foundation’s scholarship programs
- Discussion included application timelines, review processes, and award distribution
- Emphasis placed on equitable access, student outreach, and alignment with donor intent
- Board acknowledged the growing importance of scholarships as a core community impact strategy

5. Resolution Discussion (Beth Stipe)

Johnson Fund Resolution Discussion

- Board discussed matters related to the **Johnson Fund**, including governance, purpose, and alignment with donor intent.
- Trustees reviewed the need for a formal resolution to clarify administration and ongoing oversight of the fund.
- Discussion emphasized transparency, consistency with Foundation policies, and proper documentation for future reference.
- Board discussed importance of memorializing guidance related to the Johnson Fund through a formal resolution.
- Draft resolution language will be prepared and presented for consideration and possible action at a future meeting.
- Motioned by Jeff Ostenson, seconded by Leslie Freytag and Megan Collyer. Unanimous approval.

6. Budget and Trustee Nominations (Beth Stipe)

Budget Discussion:

- Preliminary discussion regarding the upcoming budget cycle
- Trustees reviewed financial positioning considering strong asset growth, increased giving activity, and ongoing program commitments

Trustee Nominations & Board Development:

- Discussion emphasized the importance of board succession planning and regional representation to include members from Chelan and Okanogan County.
- Governance Committee will develop criteria for selection of new Board members
- No formal motions or votes recorded.

7. Director of Finance and Operations Discussion (Beth Stipe)

- Board discussed the importance of strong financial oversight and operational leadership
- Role recognized as critical to supporting continued organizational growth and stewardship
- Discussion was informational only; no formal action taken

Meeting adjourned following completion of agenda items.

Next Board Meeting: March 17, 2026. 5:30 – 7:00 pm



CFNCW Executive Committee

Meeting Minutes

Date: 2/13/26 - Time: 8:00 – 9:00 am

Attendees (VIRTUAL): Beth Stipe, Betsy Cushman, Leslie Freytag, Steve Wright, Jeff Ostenson, Evan McCauley, Diane Blake, Megan Collyer

1. Transition Discussion

- Betsy to join Executive Committee; she's tasked with leading a new "Transition Committee".
 - Transition Committee will focus on development, hiring and shift of new leadership before Beth leaves the Foundation. Transition period is 2026-2028. The selection process of hiring a new Executive Director will be handled by a separate Selection Committee.
 - Communication Plan will be disciplined, organized and structured as we share the news with stakeholders, donors, partners, etc.
 - A lot to do – Org chart has been established; needs just a bit of polishing. Additional steps have been outlined with target dates/goals set.
 - Succession plan important – need to have practices and policies in place so new leadership understands established, Board approved processes and procedures.
 - Selection Committee to overlap with Transition Committee – opportunity to bring CFNCW into it's next life cycle and strategic planning evolution.
 - Transition Committee to meet monthly if necessary and report back to Executive Committee.
 - Evan to lead Selection Committee.

2. Monthly Operations Financial Report

- Sitting in a good financial position – quarter of a million dollars in surplus for this FY. Revenues have far outpaced our projections and expenses.
 - Hopefully add in a new salary (Director of Finance position) to book expenses and catch up to where we expected to be.

3. Budget Process Discussion

- Early FY27 assumptions presented; Limited new revenue streams, stock market performance always in question.
 - Wenatchee Valley College closed their funds with CFNCW in February. Loss of 64 funds from CFNCW.

- Budget Plan to go to Finance and Investment Committee in March; once tweaked and finalized, it will go to Exec Committee for chance to comment. Final will be presented to full Board in May.
- Plan for FY27 will be similar to the FY26 plan, except FY27 Plan may include the Communications Plan and Increase for Marketing budget.
 - Suggest increasing Marketing Budget to allow Thom to expand on website development and work on additional marketing expansion efforts.
 - Thom and Betsey to work together regarding Transition/Communications Plan

4. Impact Investing Report

- ARC Fund status: ~\$1.85M out in loans ~\$1.15M available; zero defaults to date.
- Website updates delayed by platform migration; Impact Investing page to be refreshed; full site redesign planned for 2026.
- Suggest incorporating Thom for Marketing expertise to market Impact Investing through website.
 - Some marketing has been done to share info regarding loans: Sustainable NCW and Okanogan County Housing Authority, etc.
 - Borrower testimonials indicate strong community impact and program value.

5. Director of Finance and Operations & Murdock Grant

- Hiring update: three candidates advanced to second-round interviews; initial reviewers were more confident after meetings than from resume review alone.
- Candidates have strong finance backgrounds but limited accounting depth; next panel (Steve, Colleen, Jeff, Rosario) to assess technical competencies.
- Director of Finance role will oversee bookkeeping, budgeting, risk monitoring, investment oversight (including potential RFP), and impact investing compliance.
- Committee anticipates a comprehensive investment-manager review once DOFO is in place, particularly given the Varus/Cerity merger context.
- Murdock Grant: no discussion captured in this meeting; note for future agendas if needed.

6. Trustee Recruitment

- Committee reviewed trustee recruitment priorities aligned with growing organizational needs and committee workload.
- Recruitment priorities: diversity of skills, geographic representation, and expertise in finance, impact investing, and community development.
- Members encouraged to leverage networks and upcoming events (e.g., Cerity/Varus client summit) to identify candidates.

7. Adjournment

- Next Meeting: March 13, 2026: 8:00 – 9:00 am



CFNCW Finance and Investment Committee

Meeting Minutes

Date: 02/13/26

Time: 11:30 am – 1:00 pm

Attendees (Virtual):

Board: Steve Wright (Chair), Beth Stipe, Colleen Frei, Kevin Rieke, Don Linnertz

Guests: Cal Spranger (Badgley) and Victor Lee (Verus)

1. Badgley and Verus Reports

Badgley Phelps – Cal Spranger

- Portfolio value as of 12/31/25: ~\$16.5M; as of early February 2026: ~\$16.86M, reflecting continued growth despite early-year volatility.
- Total 2025 appreciation exceeded \$2M, driven by strong equity markets and stable fixed income returns.
- Q4 added an additional ~\$250K in market value; annual income generation from dividends and interest totaled ~\$400K.
- Portfolio allocation remains optimized at ~60% equities and 40% fixed income/cash—aligned with long-term growth while providing liquidity and stability.
- Equity Breakdown: U.S. large-cap (~59%), small/mid-cap (~16%), international (~25%). International outperformance attributed to currency strength, post-pandemic economic recovery, and strong earnings.
- Fixed Income Portfolio (~\$6.2M) AZ Wells: Primarily high-quality Corporate and Treasury bonds.
- Recent reinvestments include ~\$400,000 in maturing bonds or from collection of dividends and interest payments.
 - 50/50 from Corporate Bonds (Google, JP Morgan, etc.) and Treasury Bonds.
- Credit Quality Notes: “NR” bucket reflects U.S. Treasuries not individually rated by S&P; corporate AAA ratings remain rare (Microsoft, J&J among few).
- Corporate bond spreads (~70 bps) indicate strong investor confidence; no signs of market stress or downgrades trending upward.
- Liquidity Planning: CFNCW expects a significant cash draw in the next 60 days; Badgley to coordinate sales without disrupting market exposure.

Verus – Victor Lee

- Verus celebrated 40 years;
- Merger: Verus joining Cerity Partners (~\$160B AUM). Institutional practice to remain independent within larger platform.
- 2025 Market Overview: S&P approached 7,000; strong tech and international performance; volatility resurfacing early 2026 due to tariffs and interest-rate uncertainty.
- Federal Reserve Outlook: 1–2 possible rate cuts in 2026 depending on labor market and inflation trends.
- Economic Trends: Persistent inflation pressure on lower-income households; increased credit utilization; declining savings rates.
- CFNCW Total Asset Growth: \$144M → \$162M+ during 2025 (~\$19.5M investment gains). Net withdrawals: ~\$1M.
- Performance vs Peers: 1-year 13.9% (median); 3-year ~15% (top 15%); 10-year ~9% (top quartile).
- International equities delivered exceptional results (~31%); domestic equities also strong with 16%+ returns.
- Fixed income outperformed benchmarks, delivering ~8% annual returns.
- T. Rowe Price Management Change: Lead portfolio manager exiting; strategy remains strong but now monitored.
- Voya strategy being fully redeemed due to personnel transitions and reduced long-term alignment.
- Overall Portfolio Cost Efficiency: Approx. 35 bps—significantly below industry averages for similarly sized foundations.

2. Financial Statement Review

- Total CFNCW assets near ~\$200M as of latest reporting period.
- Unrealized gains for FY (July–January): ~\$12M driven by strong market performance.
- Revenue Activity: ~\$22M in gifts received; ~\$13M distributed in grants and scholarships.
- Operations: ~\$850K in operating expenses—fully aligned with budget projections.
- Wenatchee Valley College Foundation will withdraw ~\$13M to self-manage investments; primary reasons include internal staffing model and cost savings.
- Expected Impact: ~\$7K/month reduction in CFNCW administrative fees; organization remains financially strong due to diversified revenue base.
- Other major agency funds (Methow Conservancy, Chelan Douglas Land Trust) show no signals of withdrawal and rely heavily on CFNCW’s investment performance and low-cost structure.
- Liquidity Management: Voya redemption provides timely availability of funds to meet outgoing \$13M distribution.
- Post-Withdrawal Portfolio Action: Rebalancing expected—likely shifting from equities into fixed income to maintain allocation integrity.

3. Impact Investing – ARC Fund Review

- Program Scale: ~\$1.85M deployed across active loans; ~\$1.15M available for new loans; demand pipeline expected to grow.
- Zero Defaults: All borrowers are current on payments and milestones; no indicators of repayment risk at this time.
- Interest & Origination Income: First revenue inflows scheduled for fall 2026 when loans reach their one-year anniversaries under the updated fee structure.
- Default Reserve: \$750K reserve being established in a money market fund; provides risk mitigation and will earn interest.
- Repaid Loans: Sustainable NCW and Okanogan County Housing Authority successfully completed projects and repaid loans in full; strong community impact documented.
- Outstanding Loans: CAFE, Wenatchee River Institute, Methow Community Center, Common Ground (now accepting homebuyer applications), Volunteer Attorney Services (final old-structure loan; repayment due June).
- Loan Policy Update: Committee approved mandatory upfront collection of origination fees to improve repayment protection and administrative efficiency.
- Promissory Note Updates: Legal counsel (Evan) will revise documents to reflect new origination fee timing and associated terms.
- Marketing & Visibility: Press releases prepared for each loan repayment; borrower testimonials shared with community partners and donors.
- Program Launch Timing: Pilot program ends in May; next meeting to finalize public launch plan, borrower access materials, application workflow, and website updates.
- Website Status: Migration to new platform caused temporary delays; full redesign planned for 2026 including a dedicated Impact Investing portal.
- Borrower Feedback: Reports highlight improved organizational capacity, enhanced project timelines, and strengthened community outcomes due to ARC loans.

4. Adjournment

- Next meeting will address ARC launch readiness, budget planning, and updated investment oversight requirements.
- Next Meeting Scheduled for March 13, 2026: 11:30 – 1:00 pm.



CFNCW Programs Committee Minutes

February 24, 2026 - 8:00-9:00 am

Virtual/In-person

Attendees:

Denise Sorom, Karen Nichols, Alejandra Gonzalez, Rick Wray, Megan Collyer, Jennifer Short, Claire Oatey, Julie Mott, Melissa Wisen

1. Meeting Opening & Housekeeping

- Discussion on low in-person attendance at 8 AM meetings. Denise will send a survey exploring new FY2027 meeting times (possibly a lunchtime slot).

2. Dashboard Review (Denise)

- Legacy Fund program formally launched in FY2024 and continues to show strong growth.
- Contributions by year: FY2024 – \$180,000; FY2025 – nearly \$450,000; FY2026 YTD – \$162,000.
- Cumulative Legacy Fund contributions total approximately \$792,000.
- FY2025 growth was attributed to early major gifts, including a \$100,000 contribution to Cashmere.
- Grant application volume: 96 Chelan–Douglas; 39 Methow Valley; Okanogan pending.
- Legacy grants awarded to date total approximately \$514,000.
- Leadership Institute outcomes: 93% reported new leadership practice opportunities.
- Civic confidence and civic knowledge increased across cohorts.
- Net Promoter Score of 84 reflects very high participant satisfaction and engagement.
- Nonprofit satisfaction survey data collected and pending synthesis.

3. Grants Update (Jennifer)

- Methow Valley: 39 site visits were conducted by LABs in three weeks
- Organizations had better group representation this year – more folks contributing than previously. In years past, the site visit involved discussion and review with just the director of the organization and a few additional folks.

- Methow Valley LABs - Introduction of new tiered funding “lanes” based on operating budgets; larger organizations with skilled grant writers are not competing with smaller organizations without same expertise.
 - Methow Valley has \$250,000 in their Legacy Grant funding pool this year.
 - \$25,000 grants for largest group determined by their annual operating budget
 - \$10,000 grants for next “size” group down.
 - Not all larger non-profit grant applications will be funded each year.
 - Learning process – room for improvement on how grant applications are set up for applicants – to be clearer on what we need from them.
 - Focus will be on educating and helping smaller non-profits learn how to write grant applications.
- Okanogan Valley: 37 applications (down from 50).
- NCW Foundation for Youth: New eligibility threshold (<\$250,000 budgets).
 - To be considered, organization must demonstrate operating expenses less than \$250,000.
 - The Foundation for Youth Grant is \$1000 – this amount may not make much difference for a larger organization but can make a huge difference for smaller organizations.
 - Funding will need to be spent within 6 months (extensions may be available)
 - On the application, the organization will need to explain how these funds will remove or lower the financial barriers for youth participation in their programs.
 - Larger organizations will be directed toward the Legacy Funds program as a better pathway for funding their programs.
 - Shop with Cops moved out of competitive process for the Youth Grant.

4. Scholarship Update (Julie)

- Scholarship application season is at peak volume with deadlines approaching.
- Students continue to submit applications close to the deadline, increasing staff workload.
- Julie is reviewing approximately 25 applications daily and assisting with recommendation uploads.
- General scholarship applications close Sunday: committee review begins mid-March.
- Committees are asked to have their reviews done by April 15 at which time we start going through the award process.
- Nursing, Allied Health, and Trade School scholarships remain open through June 1.

5. Leadership Institute Update (Claire)

- Grant County cohort graduated with 16 participants this year.
- Total alumni across North Central Washington number 48.
- Spring alumni event is being planned.
- Graduation featured strong civic engagement and community leader participation.
 - One graduate drove from Chelan to Ephrata for each class session and was highlighted on the City of Chelan’s website with her photo with the major who supported her at Graduation: the graduate serving as a valuable community connector.

- Mayor supporting further involvement of Chelan area citizens in the Leadership Institute program.
- Presentation to the Colville Tribal Council resulted in appointment of a tribal representative to the Civic Design Team.
 - Allows for official voice from tribal perspective as the Civic Design Program continues to be developed.
 - This group is part of our community that hasn't really been served in the past.
- This is a huge step forward in engagement with the Tribe and represents a significant step toward long-term partnership and inclusion of tribal leadership.

6. Nonprofit Practices Institute (NPI) Update

- Program is geared toward providing partnerships and professional development opportunities to non-profits throughout our region.
 - NPI is a partnership of CFNCW and Icicle Fund – partnership for over 20 years.
 - Full day workshops for Running an Effective Nonprofit are being offered on April 1 (Wenatchee) and April 2 (Omak)
 - Advocacy Building Block Workshops offered April 24 -Wenatchee (SPANISH) and September 2026 – Quincy and Twisp (dates TBD)
 - Powerhouse Boards Workshop offered in January and again May 12 (Wenatchee) and May 13 (Winthrop). September workshops in Wenatchee and Omak (TBD)
 - EQ workshops June 9 (Omak) and June 10 (Wenatchee)
 - Strategic Planning Workshops offered in October for Wenatchee and Chelan (dates TBD).
 - Rising Tides (Roundtable for non-profits for fundraising and development – 1-hour sessions scheduled once a month through the end of this year.
 - Tech Talks are also being offered – Q&A sessions on value of AI and how to empower nonprofits to thrive in the digital age.
- CFNCW contributes approximately \$20,000 annually, excluding staff time.
- Icicle Fund contributes \$25,000 annually.
- Thriving Together contributes \$10,000–\$20,000 annually.
- Secretary of State funding significantly reduces rural workshop costs.

Adjourn. Next Meeting: April 28, 8:00-9:00 am.