

## ■ Spending...Saving...Investing...Oh, My! How Does My Money Grow?

**A** workshop on investment planning will be held Thursday, June 7, 2012 at KwaTaqNuk Resort from 1:30 p.m. to 4:30 p.m. and again from 6:30 p.m. to 9:30 p.m.

Presenters will be MSU economics specialists, Dr. Marsha Goetting and Dr. Joel Schumacher. They will be providing information on points such as key investment concepts, personal risk tolerance and asset allocation, common types of investments, managing investment risk, evaluating performance, choosing and working with an investment professional, and safeguarding your investments.

Worksheets on financial planning, managing net worth, and tracking risk will be included. Charge for each session is \$10.00.

Dr. Goetting has presented workshops on Estate Planning in Polson for the past three years. She is known for the depth of her knowledge, as well as for her fast and lively presentations and keen sense of humor.

In addition, there will be a special morning session on Tribal lands transfers and planning from 9 a.m. until 12 noon also at the KwaTaqNuk Resort. The presenters will be Dr. Goetting and a representative from Confederated Salish-Kootenai Tribes.

Registration forms are available at Community Bank or in April 25 edition of Valley Journal. Mail registration and checks to Greater Polson Community Foundation, P.O. Box 314, Polson, MT 59860 by June 1. Checks should be made payable to Greater Polson Community Foundation.



The workshops are being sponsored by Community Banks, Farm Bureau Insurance, Grogan Funeral Home, CSKT Housing Authority, and the Greater Polson Community Foundation.

## ■ Polson Heart & Soul Begins Two-Year Project

**S**ince being selected to be one of five communities to receive a two-year \$100,000 grant from the Orton Family Foundation the Greater Polson Community Foundation has been moving forward to establish a framework for the Polson Heart & Soul project.

One of the first orders of business was the selection of a project coordinator to oversee the grant. The Foundation selected not one, but two project co-coordinators, Darlis & Daniel Smith for the task. The Smith's along with Todd Crossett, City Manager of Polson, were then sent to Chicago for a three-day training session conducted and paid for by the Orton Family Foundation in February. The training included workshops on how to refine our Heart & Soul project, building skills in facilitation and decision making, developing a communication strategy and establishing effective collaboration and partnerships. It was also an opportunity to meet the other winning community team members and learn about their projects for their communities.

Recruitment for members of the H&S project's Community Advisory Team (CAT) will begin soon and the project coordinator's are seeking volunteers to help us coordinate events, communications, logistics, etc.

Many events and activities are being planned throughout the year for community members to attend and participate. At the events/activities H&S representatives will be asking the community-at-large, "What do you love about our community?", "What are your concerns?", and "What are your aspirations for our community?" The H&S project will be setting up a facebook page and/or website to keep the community informed of upcoming events and progress of the project.

The Polson Heart & Soul office is now open in the northeast corner of the North Lake County Public Library and everyone is welcome to drop in and share their story. Hours of operation are Tuesday-Thursday 8:00am-4:00pm & Fridays from 8:00am-12:00pm, closed Monday. You can reach the office by phone by dialing 406.250.3498.

# Treasurer's Corner

**Challenging:** That is what the financial goals were last year, but you donors to the Greater Polson Community Foundation (GPCF) met them and exceeded all expectations. The good news is the permanent endowment fund reached \$165,000 at year-end, and your GPCF received a \$10,000 incentive grant from the Montana Community Foundation (MCF) for increasing the endowment by \$50,000.

The same 20% incentive is in place for this year, and an additional \$9,000 is needed by June 30, 2012 for your GPCF to receive another \$10,000 from leverage of funds!

**GPCF Grants:** From 2009 through 2011, GPCF has awarded a total of \$35,389 in grants to non-profit organizations benefiting those who call Polson home. Without your continuing support, these awards would not have been made!

**Leadership Grant:** The Montana Community Foundation awarded GPCF \$6,000 last year for the Envision Polson! Project. Three thousand dollars of that grant was used to apply for, and receive, the \$100,000 Orton Family Foundation Grant to expand the Envision Polson! Project. Not bad leverage of funds.

**Matching Funds Needed:** The Orton Family Foundation Grant requires that we raise a hard match of approximately \$60,000 over the next two years. We have received \$5,000 from the First Interstate Bank Foundation to start us on the way along with a



Jarrod Shew, Branch Manager of First Interstate Bank (second from right), presents a \$5,000 check to the Greater Polson Community Foundation. Accepting the donation on behalf of GPCF are (left-right) John Cowan, Darlis Smith, Penny Jarecki and Alece Montz, Orton Family Foundation Coordinator.

substantial amount from another donor. However, we are hoping for another donation. In addition, the Montana Community Foundation awarded GPCF a Leadership grant in the amount of \$7,120 for the Heart & Soul project.

**2012 and Beyond:** The challenges will continue. The budget for this year reflects that the GPCF will increase its grants to other non-profits to at least \$15,000. The backbone of the Foundation is your contribution! Remember us now, next year, and please consider a percentage legacy gift.

## Jarecki Honored For Service To Polson Community

Polson Elks Lodge #1695 presented the Elks Distinguished Citizenship Award to Penny Jarecki at their annual awards ceremony



Penny Jarecki

Saturday, April 7th. She was recognized for her community volunteer work, especially with the Greater Polson Community Foundation and the Envision Polson! project.

## GPCF Hosts World-Class Winter Lecture Series

The Greater Polson Community Foundation invited two very interesting speakers to Polson, both of whom shared their knowledge on fascinating subjects.

The first was Jakki Mohr from the University of Montana who spoke February 16 on Business Innovations Inspired by Nature. Her presentation on biomimicry was loaded with examples of how manufacturers are using sophisticated technology to duplicate what researchers have observed in nature. The result is improved building materials and techniques as well as improved products for us to buy.

The second speaker was Denver Holt, founder of the Owl Research Institute in Charlo, who taught an audience of a 100 Polsonites interesting facts about the many different owls and raptors who live in this

area. Of course, he also shared information about the large number of Arctic owls who are wintering in Polson this year. His talk given on March 15 made a lot of people begin thinking of ways to strengthen the local economy by inviting birdwatchers to come and stay awhile.

The third speaker will be Greg Gianforte, founder of the hugely successful Right Now! Technologies, a worldwide company headquartered in Bozeman which grew to be the largest employer in Bozeman. His company was recently purchased by Oracle for \$1.5 billion. Mr. Gianforte is a very popular speaker, but he is expected to be in Polson this fall sharing his experiences in developing a very high tech company right here in Montana.

The lecture series was so well received, GPCF is hoping to make this an annual program in our community.

# ■ Envision Polson! Action Committees Hard At Work To Serve Community

**E**nvision Polson! was born in January, 2011, when the directors of the Greater Polson Community Foundation voted to convene a group of community leaders interested in Polson's future.

Now eight action committees made up of Polson community members are meeting regularly to make Polson a more inviting for both our residents and visitors to Polson. Here is a sample of what they have been doing:

**Beautification Committee** is planning the second annual "Green Up! Clean Up!" community-wide spring clean up to be held Saturday, May 5 (9 a.m. to 5 p.m.) and Sunday, May 6 (noon to 5 p.m.). The purpose is to encourage homeowners to do a spring clean-up in their own yards and to inspire pride in our community by everyone pitching in to clean up our many city parks, our down-town areas, and along our town's gateways, Highways 93 and 35.

The committee is also organizing the second annual "Polson in Bloom" Contest in late June. Categories for the contest will be "Balconies and Window Boxes in Bloom", the "Best Bloomin' Business", "Best Bloomin' Residence", "Most Beautiful Vegetable Garden", "Containers in Bloom", "Best Bloomin' Mobile Home", and "Church in Bloom".

New to their project list is a garden tour in early July with visits to selected outstanding yards which committee members say will "awaken your inner gardener."

## **Year-Round Recreation Committee**

and Polson's Parks Department are working to make the Carol Sherick Trail more inviting by establishing a trailhead with parking space and restroom facilities at 7th Avenue and 7th Street. They also are planning to develop maps that link the hiking/biking trail to the downtown area.

This committee is also organizing Polson's first Triathlon to be held Saturday, August 18! For more information about the swim, bike ride, and race, visit the website: [www.polsontriathlon.com](http://www.polsontriathlon.com).

Year-Round Recreation asked Showboat Theater owners, Gary and Becky Dupuis, if it would be possible to once again provide

art films on weekends. As a result, film buffs are now enjoying an 8-week series of high-quality films shown Saturday and Sunday afternoons at 1:30 p.m.

Speaking of films, the Flathead Lake International Cinemafest (FLIC), Polson's very first filmfest, is being planned for February 1-2, 2013. The goal is to bring some sparkle to Polson's winter season by establishing a new event for people who enjoy watching films as well as those who create them.

## **Leadership/Collaboration/Communication Committee**

in March organized a series of four listening sessions and invited members of the community to stop by and share their ideas on how our three levels of government, city, county, and Tribal, can cooperatively work together.

**Tourism Committee** has refurbished the welcoming signs at the north/south entrances to Polson, is working to expand the tourism season by encouraging more events in spring and fall, and is exploring the possibilities of eco-tourism, especially bird-watching.

## **Unique Features Committee**

has learned of a unique illustrated map of Flathead Lake to be released early this summer. It is a hand-drawn and hand-lettered interpretive map that highlights some of the special historical, cultural, and environmental elements of the lake and surrounding communities. Proposed Polson area features include the breathtaking view looking north from Polson Hill, Kerr Dam, the golf course, our theater, cherry orchards, and a historic steamboat. Sounds like a collector's item!

**Youth Committee** is once again chairing the organization of Polson's outstanding Independence Day Parade, a wonderful way to encourage kids to serve the community.

**Economy/Standard of Living Committee** is arranging a field trip to S & K Technologies in St. Ignatius for Polson high school students interested in business, robotics, and engineering. The trip will include a complete tour of the facilities and the opportunity to ask questions about its seven subsidiary companies spread between Anchorage, Alaska, and Riyadh, Saudi Arabia.

## Mission Statement

■  
*Envision Polson!  
is neighbors  
working together  
and giving voice  
to local concerns  
about the future  
of Polson.*

# ■ Greater Polson Community Foundation Sustaining Founders 2011

William and Tali Barron  
James M. and Patricia Binger  
Joe and Gerry Browning  
Jules and Ann Clavadetscher  
Catherine Cooney  
John Cowan  
First Interstate Bank  
Bob and Sharon Fulton

John and Nancy Glueckert  
Good Shepherd Lutheran Church  
Charles M. and Henrietta M. Jarecki  
Lou and Irene Marchello  
Jon and Liz Marchi  
Bob Marsenich and Karen McMullen  
John and Tina Mercer  
Montana Community Foundation

Carmine Mowbray  
William E. and Margaret A. Olson  
Matt and Evonne O'Neill  
Polson Rotary Foundation  
Peggy Seifert  
Dr. Gayle and Helen Siemers  
Jim and Barb Soh  
Michael A. and Janna J. Taylor

## ■ GPCF Donors

**October 1, 2011 - March 1, 2012**

Ken and Tamara Avison  
Richard and Carol Banghart  
George and Joleen Barce  
Dick and Bernie Beighle  
James M. and Pat Binger  
Jeff and Joyce Cadieux  
Jules and Ann Clavadetscher  
John Cowan  
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First Interstate Bank Foundation  
Sharon and Bob Fulton  
Nancy and Sam Gary

John and Nancy Glueckert  
Good Shepherd Lutheran Church  
Greg and Kate Hertz  
Jane Irwin  
Charles M. and Henrietta M. Jarecki  
Gene and Inger Johnson  
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Mayfield Foundation  
Bob Marsenich and Karen McMullen  
Matt and Evonne O'Neill

Polson Rotary Foundation  
Peggy Seifert  
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Alfred and Mary Lou Suneson  
Nancy and Gary Teggeman  
Marcus and Becky Vergeront  
James and Lucinda Willis  
James H. Woods Foundation  
Gail Wright

## ■ Important Dates

### Applications Due

**T**he application form for grants from the Greater Polson Community Foundation may be downloaded from the website: [www.polsonforever.org](http://www.polsonforever.org). Completed applications are due Monday, July 9, 2012.

### Save-The-Date

**T**he 2012 Passion for Polson Celebration will be held on a beautiful West Shore lakefront property on Saturday evening, August 18, 2012. Watch for the Save-The-Date card for more details.



**Greater Polson Community Foundation**  
Making Polson the Gem of Flathead Lake

P.O. Box 314  
Polson, MT 59860