

PASSION & PURPOSE

THE CFO MAGAZINE  SUMMER 2023

50

YEARS

*of Place-Based
Philanthropy*

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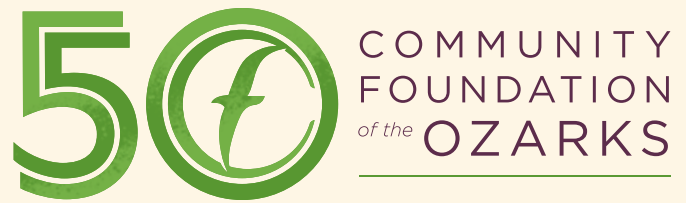
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Our mission is to enhance the quality of life in our region through resource development, community grantmaking, collaboration and public leadership.

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Letter from the Chair

A NOTE FROM OUTGOING BOARD CHAIR LAURIE EDMONDSON

The Community Foundation of the Ozarks has been around for 50 years! Wow! It is remarkable to think about how our community has grown and changed since then. In 1973, I was attending Delaware Elementary and happily playing with my friends after school. In some ways, it seemed like a carefree life in a different era. But, even then, there were people and organizations in our community who needed support. Thank goodness the founders of the CFO had the vision to create this wonderful organization as a place for people to reach out and help people in our community with passion and purpose.

As I reflect on this past year, the word that comes to mind is gratitude. We have been through some difficult times in the last few years, but there are so many wonderful people and organizations in our community who are out there making a difference every single day. Our community is stronger because of all of the compassionate nonprofit agencies that see the needs in the community and provide services that truly make a difference for all of us. At the CFO, we are in a special position to support specific needs throughout the region as they arise.

I think about the children and families who are supported through the Jeannette L. Musgrave Foundation. I think about the performing and visual arts communities that are supported through the Springfield Regional Arts Council. I think about the people who were able to make it to work during the pandemic because of the Let's Get to Work initiative. I think of the ways lives have changed for the better because of the CFO's collaborations with nonprofit partners in health care and education. I think of all of the nonprofit agency partners supported by the CFO's administrative, educational and technical assistance. I think of our affiliates throughout the region who are making lives better every day in their communities. I think about our group of next-generation donors who are getting ready to jump in the philanthropy world and make a difference in a way that only they can.

I am grateful for everyone who works together to make

our region a better place. It has truly been an honor to serve as the chair of the Board of Directors this past year. This board and the staff here at the CFO are truly the best people I know. They work tirelessly to support our community and they are absolutely making a lasting positive impact for so many people. And I feel like we are just getting started. Isn't it wonderful to think about the next 50 years? Just think how wonderful our world will be in 2073 because of the caring and compassionate people who are involved with the CFO right now! So many possibilities. I am so grateful for all of it.

With these reflections and visions of the future in mind, I shared this poem by Ralph Waldo Emerson with the CFO board and staff before I handed the gavel over to Dean Thompson, the incoming board chair:

*To laugh often and much;
To win the respect of intelligent people and the affection of children;
To earn the approbation of honest critics and endure the betrayal of false friends;
To appreciate beauty;
To find the best in others;
To give of one's self;
To leave the world a bit better, whether by a healthy child, a garden patch, or a redeemed social condition;
To have played and laughed with enthusiasm and sung with exultation;
To know even one life has breathed easier because you have lived;
This is to have succeeded.*

Thank you to everyone reading this issue for everything you do to support the foundation. The CFO continues to succeed because of you.

—LAURIE EDMONDSON
FY23 BOARD CHAIR



▲ At the conclusion of the CFO's June board meeting, President Brian Fogle presented a special gift to Laurie in recognition of her service as board chair. The painting "Celebration" was commissioned for Laurie from Springfield artist Penny Gordon-Chumbley as a reminder of the 50,000 daffodil bulbs planted across the region during Laurie's term.

Honoring years of service to the CFO

The CFO extends its appreciation and gratitude to three members of the Board of Directors who completed their second three-year terms as of June 30. They have served in a variety of leadership roles for the CFO and the network of affiliate foundations.

Rhonda Christopher served as the Board Chair for the 2020–21 fiscal year during the challenging days of the pandemic. She also has served on the Governance and Ozarks Charitable Real Estate Foundation committees. A Managing Director for FORVIS Wealth Advisors, Rhonda is a member of the Professional Advisors Council.

Robin Morgan served as the Board Chair for the 2021–22 fiscal year; she also spent many years as president and board member of the Community Foundation of West Plains' governing board. She has been a member of the Governance, Regional and Coover Regional grantmaking committees. She and her husband, Charles, hold a donor-advised fund under CF of West Plains.

Marvin Silliman first became active with the CFO when the Community Foundation of the Lake was founded in



Rhonda Christopher



Robin Morgan



Marvin Silliman

2009 and he served as its first president. A retired financial advisor, Marvin also serves on the Investment Advisory Board and the Regional Committee. He and his wife, Lucile, are members of the Legacy Society and hold a donor-advised fund under CF of the Lake.

New Board Members

The CFO welcomed three new board members who began their first three-year terms on July 1.

Gary Garwitz is a retired managing partner for BKD CPAs & Advisors, now FORVIS. He is chair of the Audit/Operations Committee; that position was added to the Board and CFO Executive Committee effective this year when the Bylaws were updated in FY22.

Greg Hoffman, a retired financial advisor, serves as president of the Nevada/Vernon County Community Foundation, which was founded in 2020. He also is a donor advisor and member of the CFO's Professional Advisors Council.

Sarah Honeycutt, a Cabool educator, serves on the boards of the Cabool Community Foundation and the Cabool Education Foundation.

FY24 EXECUTIVE COMMITTEE

- Chair: Dean Thompson, Republic (City Utilities of Springfield)
- Vice chair: Anne E. McGregor, Branson (The Neighbor Company)
- Treasurer: Roy Hardy Jr., Ozark (Associated Electric Cooperative)
- Secretary: Gail Smart, Springfield (attorney and community volunteer)
- At large: Ron Kraettli, Hermann (retired banker)
- Investment Advisory Board Chair: Kari Creighton, Springfield (financial professional)
- Audit/Operations Committee Chair: Gary Garwitz, Springfield (retired partner at BKD, now FORVIS)
- Chair Emeritus: Laurie Edmondson, Springfield (Drury University)

The CFO's FY24 Action Plan

The CFO is completing its FY2020–24 Strategic Plan and in the process of developing the next plan this summer.

The FY24 Action Plan reflects the final steps and implementation of the goals included in the current strategic plan.

Work on these initiatives will provide a solid basis on which to launch the CFO's next strategic plan and leadership vision.

- ▶ Implement the Facilities Task Force recommendations for a new office facility in Springfield.
- ▶ Launch the Generosity Collective, a "next-gen" giving circle designed by the Development Committee.
- ▶ Conduct the search process for the CFO's executive leadership transition.
- ▶ Complete Activity Based Cost (A-B-C) analysis, a study to determine the specific costs associated with administering different types of funds and leadership activities prior to a future review of the CFO's fee structure.
- ▶ Complete and implement the request-for-proposal process for banking services.
- ▶ Research and recommend a decision on pursuing the Council on Foundations' national accreditation process.
- ▶ Develop, approve and implement new strategic plan and recommendations resulting from June 2023 board retreat.

Fifty Years of Philanthropic Leadership



In the early 1970s, a group of estate-planning attorneys learned of a sizeable estate gift that left Springfield because there wasn't a place here to accept a general gift for community betterment. The 11 founders (pictured below), supported by then-Springfield Mayor Jim Payne and businesswoman Anne Drummond, created what is now known as the Community Foundation of the Ozarks in 1973. Fast-forward fifty years and a lot has changed.

Now, if you ask three people to describe the CFO, you'll likely get three very different answers. The region's largest public charitable foundation is best known by the way in which people interact with it, rather than its full spectrum of philanthropy.

Over the last 50 years, five examples of philanthropic leadership have shaped the

CFO's focus, all made possible by support from donors, volunteer leaders in Springfield and across more than 50 regional affiliates, professional advisors who help people pursue their charitable intentions, and nonprofit partners who provide the direct services that help the CFO fulfill its mission.

These five examples of philanthropic leadership represent the return on the investment of \$1,500 made by the 15 banks that each contributed \$100 to start the CFO in June 1973.

"With more than a half-billion dollars out the door in a half century and assets exceeding \$400 million today, it's exciting to think about what the next 50 years will bring in our continued commitment to place-based philanthropy," CFO President Brian Fogle says.

Building Nonprofit Capacity

Grantmaking and scholarships are among the highest profile roles foundations serve; to that end, the CFO has surpassed a half-billion dollars in grants, scholarships and distributions. About 90% of those dollars stay in Missouri. Grants are made by donor advisors who support organizations through their own charitable funds as well as the CFO's discretionary grant programs determined by volunteer committees. From the very first CFO grant—\$10,000 to the Dickerson Park Zoo's petting zoo in 1975—to million-dollar multi-year collaborations, the CFO invests in nonprofit organizations that provide direct services to residents.

In 2009, the CFO ramped up its nonprofit partners program in which 501(c)3 and similar agencies hold funds with the CFO and, in turn, receive administrative support, investment options and educational opportunities. The philosophy is simple: By offering educational training and technical assistance, the CFO believes a stronger nonprofit community will use its grant-making dollars most effectively.



HEARLD R. AMBLER



JAMES S. BUCKNER JR.



JOHN M. CARNAHAN JR.



CHARLES A. FULLER JR.



ROGER L. GARRISON



FRED L. HALL



HORACE S. HASELTINE



GARY L. LIPSCOMB



VINCENT TYNDALL



C. WALLACE WALTER



R. BARNES WHITLOCK



Developing Rural Philanthropy

Twenty years into the CFO's history—in 1993—community leaders in Nixa asked the CFO to extend its model of place-based philanthropy to smaller communities. With local leaders to identify community priorities and the CFO's administrative support in Springfield, the model for **regional affiliate foundations set by the Nixa Community Foundation has been replicated in more than 50 other communities, counties and regions.**

From the affiliate network, the Rural Schools Partnership evolved in 2010 to strengthen schools as anchors of rural communities. Its signature program,

the Ozarks Teacher Corps, received national attention for supporting students willing to commit three years to teaching in a rural school—often the district where they graduated. In addition to the scholarship support, **Corps members receive special professional development** and join a network of rural educators and advocates.

The CFO's connections to rural communities have led to multi-year grant programs like Growth in the Rural Ozarks to spur economic development in smaller communities, and the Rural Ozarks Health Initiative to address specific health and wellness issues.



Responding to Emergency Needs

Twenty years ago, a **tornado destroyed a large swath of downtown Stockton**, the Cedar County seat and site of the CFO's then-newest affiliate. The CFO helped local leaders like **Brian Hammons, president of the Stockton Community Foundation at the time**, to gather community input for rebuilding and opened a community development loan fund. Since then, the CFO supported Joplin's 2011 tornado recovery efforts over the following five years, Branson's Leap Day tornado in 2012 and several flooding disasters in south-central Missouri.

In other times of crisis, more than \$5.3 million in grantmaking helped the region weather the COVID-19 pandemic; during the 2008–10 Great Recession, grantmaking pivoted to operating support to sustain nonprofits serving higher numbers of clients.

Beyond immediate and long-term recovery needs, the CFO's ongoing disaster-related work includes administering corporate benevolence funds to help employees in crisis; granting emergency funds to support community needs that arise, such as overnight shelters during extreme cold weather; and funding preparedness and mitigation efforts to help people and communities better withstand future disasters.



Expanding Resources

One component of the CFO's mission is collaboration, a trait long considered a regional strength. Resources are most effective when communities agree on priorities, when duplication of services is minimized and when sharing information helps break down complicated issues.

The CFO started a funders forum in 2012 where public and private charitable funders find common ground to support issues like early childhood education, food insecurity and the post-pandemic Let's Get to Work program to help workers and employers overcome transportation as a job barrier—which originated from **a series of donor-education events with panels discussing roles philanthropy could play in pandemic recovery and workforce development.** This record of collaboration also is attractive to state and national funders willing to invest in the region using the CFO as their "boots on the ground."



Investing for Impact

The "double-bottom line" is the phrase used to describe the CFO's mission-related investment program. It offers below-market loans, often as gap financing, for projects with a public purpose. Examples include a bio-mass generator to power the Gainesville schools' HVAC; a storm shelter in Chadwick; and helping a Dent County hospital purchase a MRI machine so patients don't rely on monthly mobile MRI machine visits.

"When we began our mobile service back in 2005, we would do anywhere between 15 to 25 patients a month," says **Bobby Sullins, medical imaging director at Salem Memorial District Hospital.** "With our in-house MRI, now we're doing close to 100. We've got the availability, the access into that, and so it's really helped the community."

Other impact investments by the CFO include seeding efforts like Restore

SGF, an organization to increase home ownership in Springfield; supporting labor expenses for nonprofits most affected by the pandemic stay-at-home orders; and being a founding partner for the Community Focus Report for Springfield-Greene County.



MORE ONLINE

Find stories, special videos and more as they are released at cfozarks.org/50years.

A Cause for Celebrations

GOLDEN ANNIVERSARY SPARKS EVENTS FOR DONORS, ADVISORS AND PAST BOARD MEMBERS

► The **Legacy Leadership Reunion** kicked off a series of events to celebrate the 50th anniversary of the Community Foundation of the Ozarks. The gathering of past and current CFO board members was held March 8 at Cellar + Plate in Springfield.

▼ Fred Hall, one of the CFO's eleven founders, recounted the origin story of the foundation for attendees.



▲ **Marni Jameson**, author of “What to Do with Everything You Own to Leave the Legacy You Want,” shared her expertise in decluttering with the CFO’s donor advisors and the Professional Advisors Council. The event took place March 30 at the Hilton Garden Inn in Springfield.

◀ Her primary takeaway for attendees: Plan your legacy with the same intention you’ve lived your life. Or, as she simply states: “Finish the job well.” Letting go of a life’s accumulation of possessions you don’t use and family members don’t want can help build resources to create long-lasting support for your community, school, church or nonprofit focused on your priorities.



▲ The **AnniverSafari**, an extra-special take on the CFO’s annual donor-appreciation event, was held June 22 in Springfield at the Dickerson Park Zoo—the recipient of the very first grant from the CFO.

► Attendees like Kari Creighton, chair of the CFO’s Investment Advisory Board, took the opportunity to get up close and personal with the zoo’s giraffes.



◀ The team from nonprofit partner Care to Learn—Andrea Harp, Erica Harris, Krystal Simon, Jhasmine Watson and Justin Wagler—were the first to complete the Philanthropic Scavenger Hunt to qualify for one of 10 chances to grant \$500 to a favorite nonprofit. (You can take a pretty easy guess at which nonprofit they’d pick.)



► The donkey and goats at the petting zoo were undoubtedly happy to meet Gloria Galanes, a past CFO board chair and establisher of the St. Francis Fund. The field-of-interest endowment supports an annual grant round for animal welfare organizations in the Springfield area.



AFFILIATES



Rural funders gather at first ‘Summit’

AFFILIATE LEADERS AMONG ATTENDEES OF STATEWIDE EVENT ON APRIL 25

▲ *Downtown Joplin Alliance’s Ivy Hagedorn, Community Foundation of Central Missouri’s John Baker, and Community Foundation of the Lake’s Stacy and Jan Pyrtle share their experiences with collaborative funding during a panel at the Rural Philanthropy Summit.*

Nearly 200 leaders from different places and backgrounds were united by a common mission at Missouri’s first statewide Rural Philanthropy Summit. The event, presented by the Community Foundation of the Ozarks and Philanthropy Missouri, drew representatives from most of the CFO’s regional affiliate foundations for information and inspiration on how to better lead and serve their unique corners of the region.

“Rural America represents 97% of the country’s landmass and 20% of the population—but less than 7% of foundational giving targets rural places,” said Brian Fogle, CFO president and CEO. “Additionally, almost 90% of all individual giving goes to urban areas. We need to do better in philanthropy. That’s one of the reasons that we are here.”

The daylong event, held April 25 at the Oasis Convention Center in Springfield, began with plenary presentations from three leaders in rural philanthropy. (See feature on opposite page.) Tabletop discussions later allowed participants to focus on issues close at heart and hand. Groups formed across the room to talk about housing and homelessness, education, economic and workforce development, as well as health and mental health—and how novel solutions are necessary.

During the conversation about promoting greater mental wellness, facilitator Sarah Moody shared the concept of supporting crisis centers for mental health or substance abuse emergencies, which allow patients to receive quick treatment without going to a hospital emergency department.

“We’re seeing more of those popping up places,” said Moody, who works for the Missouri Foundation for Health.

“Obviously that is a wealth of resources and coordination to make something like that happen. It’s not like, ‘We’ll just open one up next week down the street.’ But that is something that we’re seeing more and more in our communities, and coming to more rural communities.”

As discussions concluded, lunch began, which featured a panel of shared experiences relating to collaboration. Topics ranged from the creation of the Joplin Empire Market to Columbia and times of crisis during the COVID-19 pandemic to the Magic Dragon Trail System, a project of the Community Foundation of the Lake.

“Having key people who are passionate about the project and in leadership positions was very important,” said Stacy Pyrtle, vice president of the CFL and a project leader. “They need to really be passionate about it to stay with it. We have several different kinds of committees and organizations working on it and making sure each one of those has the three Ws—of wealth, wisdom and workers—on those committees is very important to keep it moving forward.”

After lunch, breakout sessions gave participants a taste of four other topics related to philanthropy’s role in rural spaces, with regard to digital needs, inclusivity, capturing transformational gifts and federal grant dollars.

On the latter: If at first you don’t succeed, it’s important to try again, said Tony Pipa of the Brookings Institution.

“If you don’t have experience getting federal funding, that first hump and getting (your) first set of federal funding can be quite difficult,” Pipa said. “Those that get experience working with state funding agencies or federal funding agencies

EXPERTS IN RURAL PHILANTHROPY

Tony Pipa

BROOKINGS INSTITUTION

Where Tony Pipa grew up in rural Elysburg, Pennsylvania, public service isn't what you did; it's who you were. From his initial recognition by the local Rotary Club in high



school, Pipa went on to a career in diplomacy to share who we are as citizens of the United States and what this country means to the world.

Today, after a community foundation career stop in Durham, NC, he is a Senior Fellow for the Brookings Institution's Center for Sustainable Development. That includes sustaining rural places that lack staffing for economic development and complex government grants along with access to services like high-speed internet.

Pipa believes the narrative of rural decline is changing with a shift in perception to rural areas becoming places for opportunity, new energy sources like sun and wind, outdoor recreation, enviable cost of housing, and easier access to local food sources. New entrepreneurial startups are happening at a higher rate with longer sustainability in rural areas, he said.

"When we looked at America's ongoing economic competitiveness, it became quite clear that the country needs to leverage all of its talents and resources," he said. "If we can support local thriving places that are connected together, we'll have more resilient regional economies. We'll be better positioned and more sustainable for the long haul."

tend then to understand what is expected and tend to be able to access those monies over and over."

He suggested taking feedback and using that to adapt an application, gave an example of a community who worked with a co-op to apply for funding—and took three tries.

"The third time they got the money; they got a multi-million-dollar grant to get the physical infrastructure that they needed," Pipa said. "From the co-op's point of view, we had done this process many times before, that was not unusual. But from the community's point of view, it seemed very difficult, and they were not going to continue to persist to be able to get that money. That kind of experience is invaluable when it comes to being able to access the types of funds that we're

Caitlin Cain

RURAL LISC

Philanthropic funding is one lens through which to view more investment in rural communities, but the lens should be wide angle to leverage other resources as much as possible.



That was a key theme from a study prepared by Rural LISC, a program of Local Initiatives Support Corp., the country's largest community development finance institution. Rural LISC Director Caitlin Cain said the study intentionally focused on LISC's three main lanes—housing, broadband internet access and workforce development.

Poverty and disinvestment are pronounced in many of the rural areas where 37% of Missouri's population lives, Cain said. Philanthropic investment also is lower in these areas. But, she said, money is sitting on the sidelines at the state and federal levels, which can be leveraged in some cases with philanthropic resources. She also referenced the new statewide Transfer of Wealth study and its potential for rural communities to capture a portion of the assets moving from one generation to the next through inheritance and estate planning.

"Think about what that potential could mean for rural communities," Cain said.

The Rural LISC study proposes a five-year strategy focused on: creating a rural collaborative; achieving a localized scale; developing a statewide rural investment entity; and undertaking rural investment advocacy.

going to be talking about."

As the event concluded, participants were given a charge to not let the work of the day stop.

"We're here today to encourage you and ourselves to not just think about (ideas) but to take that next step," said Michelle Miller, president and CEO of Philanthropy Missouri. "If you are already working in rural places, keep doing the great work that you're doing—and consider what next step or two or three you can take to make your work even more strategic, more collaborative and more impactful. Who do you need to talk to? What do you still need to learn? I encourage you to take those next steps."

—by Kaitlyn McConnell; plenary feature by Louise Knauer

Kim Davis

WALTON FAMILY FOUNDATION

As most Ozarkers know, the once sleepy corner of northwest Arkansas is now a daytrip and weekend destination not just for floating the scenic Buffalo River, but visiting Crystal Bridges Museum, shopping, dining, concerts—even shredding the gnarliest of the region's extensive mountain biking trails.

Kim Davis, a senior advisor for the Walton Family Foundation based in Bentonville, Arkansas, explained the years-long process it took to develop the 40-mile Razorback Greenway—along with 100 miles of additional trails—into one of the nation's leading biking destinations.

The Walton Family Foundation was a catalyst in developing the system, which intentionally routes through smaller communities to create regional economic development. The trail system has spurred many secondary markets to support cyclists, from bike shops to restaurants. The process encourages deep conversations with municipalities across the system, Davis said. The goal is to figure out both the "through lines" that connect communities and honor the individual attributes of each place.

"When people ask me about northwest Arkansas, I immediately go town by town," Davis said. "There are regional wayfinding signs, but logos are a little different based on the city to make sure they maintain who they are in the process. Maintaining that 'who' is critical to the process."





Eric Gibson



Bonnie Prigge

Awards honor five leaders for devotion to rural communities



Cynthia Glenn



Tom Jacquin



Natalie Lorenz

The Community Foundation of the Ozarks recognized five individuals for outstanding leadership in their communities during the Rural Philanthropy Summit on April 25. The awards mark 30 years of the CFO's Affiliate Foundation program, which began in 1993 with the establishment of the Nixa Community Foundation.

Eric Gibson, president of the Community Foundation of West Plains Inc., received the Stanley Ball Leadership Award. Ball, who died in 2015, was the founding president of the Nixa Community Foundation. He embodied the strengths of business, civic and philanthropic leadership working together to enhance our communities. The award is presented by the CFO and Central Trust Company, which manages the Stanley & Elaine Ball Foundation. In Gibson's honor, the Community Foundation of West Plains Inc. received a \$2,000 grant.

Gibson was recognized for his outstanding leadership at the foundation and for serving his community and region as a volunteer for a number of organizations for more than 20 years. During that time, he was directly involved in raising more than \$1.25 million for the American Cancer Society.

Bonnie Prigge, board member of the Meramec Regional Community Foundation and executive director of the Meramec Regional Planning Commission, received the Fred Lemons Achievement Award. The award is named for the late president of the Lockwood Community Foundation, who demonstrated remarkable leadership during his 15-year tenure until his death in 2014. Presented by the CFO and the Lemons family, the award includes a \$1,000 grant to the Meramec Regional Community Foundation in Prigge's honor.

Prigge was recognized for the outstanding record of asset growth in her 12 years on the board of the MRCF, her service to the Meramec region, as well

Leading Locally SERIES

As part of the CFO's 50th anniversary celebration, CFO Writer in Residence Kaitlyn McConnell is profiling every regional affiliate and the individuals who lead them. Find the year-long series online at cfzarks.org/leading-locally.

ALSO ONLINE

Five affiliates were recognized as Affiliates of the Year during the Rural Philanthropy Summit. Learn more at cfzarks.org/aoty2023.

CHANGING OF THE GUARD

Several CFO affiliates changed leadership between fall 2022 and the end of the 2023 fiscal year. We appreciate the efforts of these past presidents and wish the new leaders much success in building these foundations' roles in community betterment.



Benton County Community Foundation

Outgoing: Shannon Smith
Incoming: Dorcas Brethower

Community Foundation of Taney County

Outgoing: Vacant
Incoming: Rod Romine



Dallas County Community Foundation

Outgoing: Joy Beamer
Incoming: Jazmyne Custer



Finley River Community Foundation

Outgoing: Mike Woody
Incoming: Elise Crain



Meramec Regional Community Foundation

Outgoing: Vicki Lange
Incoming: Randy Becht

as her service to Missouri Association of Councils of Government as secretary/treasurer and past-president.

Three regional affiliate leaders were honored with Board Members of Excellence awards for outstanding service to their communities:

- **Cynthia Glenn**, Finley River Community Foundation
- **Tom Jacquin**, Community Foundation of the Hermann Area
- **Natalie Lorenz**, Perry County Community Foundation

"For 30 years, our regional affiliate foundations have done so much to improve the quality of life in many communities across our wide service area," said Alice Wingo, the CFO's vice president of affiliates. "Our foundation leaders work hard to build long-term, sustainable resources that will benefit all sectors of a community. With exemplary foundations and leaders like the ones honored today, these 53 towns, counties and regions have bright futures ahead."



► Council of Churches of the Ozarks CEO Jaimie Trussell, center, shared her perspective on endowments as the leader of a nonprofit partner during an joint Agency Partner/ Donor Services education session on May 18.

Nonprofit partners, donor advisors convene for endowment education

Donors and nonprofit leaders represent two sides of the same coin when it comes to endowments, but discussing the concept of giving to a permanent, sustainable source of funding can be difficult—especially when current demands can take priority for a nonprofit’s fundraising efforts. To help guide conversations about endowments, the CFO hosted a panel discussion on May 18, the first in a series of joint Agency Partner/Donor Services education events.

“The important thing to consider how an endowment will work for you is really clear communication about what you want to do long-term financially and what your goals are as an organization—you have to be crystal clear on those,” said Jaimie Trussell, CEO at Council of Churches of the Ozarks. “That’s the number one reason I have found donors enjoy endowments because nobody gets to change their mind about how to use this money.”

Michelle Reynolds, director of development at Three Rivers College in Poplar Bluff, said her personal goal is to build an endowment that can cover the community college’s annual operating

expenses to provide flexibility for other fundraising goals, including other endowments.

“We are really working on endowing funds to pay for anything institutional that my president and I really want to see live on,” she said. “We’re not thinking 10 years from now. We’re thinking of the days that we are dead and gone.”

Representing the donor’s perspective, Dr. Gloria Galanes, faculty emeritus with Missouri State University and a past board chair of the CFO, encouraged attendees to allow for flexibility when establishing an endowment.

“At Missouri State, there was a scholarship that was written so restrictively that it had not been given in a number of years because nobody fit the criteria,” she said. “Be careful, when you’re setting it up, that you don’t write it so restrictively that it can’t be given out.”

All three on the panel pointed to the CFO and other nonprofit leaders as resources for discussing endowments.

“Most people who have wealth have a really good lawyer, a really good accountant, probably a really good financial planner. Guess what they don’t have? A really good give-it-away-er,” Trussell

ANNIVERSARY ENDOWMENT CHALLENGE

As part of the CFO’s 50th anniversary celebration, a total of \$100,000 is available to 10 nonprofit partners to bolster their endowments. These agencies must raise \$15,000 between July 14 and Aug. 15 to qualify to earn the \$10,000 matching grants:

- Breast Cancer Foundation of the Ozarks
- Cabool Education Foundation
- Cape Public Schools Foundation
- Care to Learn
- Christos House Inc.
- Jasper County CASA
- Ozark Greenways
- Springfield Dream Center
- Springfield Sister Cities Association
- Watershed Committee of the Ozarks

To learn more, visit cfozarks.org/endow2023.

said. “You have to pull in your nonprofit friends who are experts at giving it away.”

To view a recording of the event, go to cfozarks.org/endow.

Couple discovers *'slickest way'* to give

LONGTIME SPRINGFIELD RESIDENTS INCREASE THEIR CHARITABLE GIVING BY 300% AFTER ESTABLISHING A DONOR-ADVISED FUND

It wouldn't have seemed very likely for Henley Parker to ever meet Robert "Bob" Smith: Henley was living near an aunt in Wichita, Kansas, a decent distance from where she grew up in northwest Arkansas, when a tall New Englander moved into her apartment complex. Bob was farther from home and even less likely to end up in the middle of the Free State: growing up near the lakes and coastal shoreline of Massachusetts and Maine, Bob had hoped to end up near the ocean. He had told his new employer — American Hospital Supply — that he'd really prefer the coast, east or west. When they placed him in Wichita, he wondered what he'd done wrong. Then he met Henley. "When some friends introduced us, he said I was too short," she says now with a laugh.

Height disparity notwithstanding, they married in 1967 and found their way to Springfield a decade later. "I've always said [Springfield] is like New England, but without all the people

and taxes," Bob says. The Ozarks offered the waterways for the boating and fishing that Bob craved, and Springfield had many more trees than Wichita had, which pleased Henley. Most importantly, they found that it was a friendly city that seemed to be the perfect place to raise their young son and daughter.

It was also a place with many opportunities for volunteering: Henley had a history of charitable work, particularly with organizations supporting the vision impaired, and her connections

in her sorority Delta Gamma and the Junior League allowed her to continue volunteer work in Springfield. She was first placed with the Volunteer Action Center, and through her and Bob's church, the couple found a number of organizations in need of help in the area. Henley served for many years on the board of the Regional Girls' Shelter.

Giving back to the community

Bob was able to retire from American Hospital Supply at the age of 50, and after a few years, the couple found themselves with enough assets to begin to look into ways to boost their charitable giving. Ever pragmatic, it was key for the Smiths that their giving be prudent, sustainable and effective. "Like many people, we donated our appreciated stocks at year end," Bob recounts. "Problem with that, however, is that a lower year-end market meant that raising donation dollars might be at lower prices than other times during the year."

The Smiths' CPA recommended they connect with the Community Foundation of the Ozarks. "We had known Brian Fogle for many years through church, and we knew him for his banking expertise," Bob says, "I felt like I was going home when I talked to Brian, Caitlin Golike and others."

This is how the Smiths came to establish a donor-advised fund with the CFO, which allows them to "pick an advantageous time of the year (for their giving), as the money is already there (in the fund)." Bob calls this their "cash stash," and it allows for quick and flexible options for charitable giving. For example, when a friend of Bob's who sits on the board of the A Girl Like Me Network casually mentioned that

the nonprofit was falling a bit short of its fundraising goal for a float trip for disadvantaged girls, Bob called Caitlin Golike, the CFO's director of donor services, and requested a grant of \$1,000 for the agency.

"Caitlin makes it real easy," Henley explains. "We give her a phone call, whether it's a memorial for somebody or anything else like that, she'll take care of it."

Bob goes on: "And when you hang up that phone, you're done! You don't have to keep track of donations, nothing you have to do, and when the phone call's done, all the paperwork is done ... it just is so easy." Because of this flexibility and convenience, the Smiths say that giving to various organizations as



"We like giving locally.

There are so many needs and it keeps changing, so it's nice to be flexible."

—HENLEY SMITH



the needs of those organizations change has become a breeze. Additionally, the shift from a potential posthumous gift to their current donor-advised fund means that the Smiths' lifetime giving increased by 300%.

A letter of appreciation that Bob sent in to Brian Fogle perhaps most colorfully illustrates his enthusiasm for giving through the CFO:

"Henley and I have been in your program for over a year now and I must say, you have the slickest way I've ever seen to give away money. A guy with a gun at my back couldn't do it with such grace and ease."

Home in the Ozarks

When he was a boy in Massachusetts,

Bob experienced the passing of his father, a tragic event that began a life path that took him to Iowa for graduate school. That's when he picked up a position at American Hospital Supply, which stationed him (against his coastal wishes) in Wichita. From there, Springfield became, and remains, a home and a community where they can make a positive impact.

"We like giving locally," Henley says, "and the guild I'm in in church does children's charities, and (through that) I'm fully aware of what's needed in the area. There are so many needs and it keeps changing, so it's nice to be flexible." A phrase they both come back to is: "We made our money locally; we want to return it to our community."

The couple expresses a deep wonder at the unpredictable, topsy-turvy series of events that brought them together and to Springfield, and Bob admits that if his father hadn't passed away when he had, Bob almost certainly would have taken over his father's insurance business and remained in New England. He and Henley understand this path through the lens of their strong faith: "It's amazing how God leads you," Bob says, to which Henley agrees, "It's a God thing."

And while he may be quick to share the benefits of giving through a donor-advised fund at the CFO, like a true born-and-bred Ozarker, Bob is tightlipped about his favorite fishing spots: "I don't wanna tell ya!"

—by Matthew Stewart

▲ *After making Springfield their home nearly 50 years ago, Bob and Henley Smith now dedicate their philanthropy to local causes through a donor-advised fund.*

New study showcases power of giving 5%

When individuals and families decide how to pass on their financial and physical assets, they are participating in the national transfer of wealth that in Missouri alone will amount to more than \$114 billion over the next 10 years.

And if at least 5% of those assets are donated, community foundations and nonprofits could receive more than \$7.6 billion in that time.

Those findings are included in the 2023 Missouri Transfer of Wealth Study, released in June by the Alliance of Missouri Community Foundations with support from the Patterson Family Foundation in Kansas City. The goal of the Alliance is to encourage Missouri residents to consider allocating at least 5% of the assets they will pass on after their lifetimes to benefit their communities and favorite charitable causes.

If those gifts of 5% were endowed,

meaning a portion is spendable while the principal stays intact to grow over time, a typical payout would create \$383 million in new charitable resources every year for perpetuity.

“The potential benefits to our communities and nonprofit sector would be staggering if Missourians adopted the ‘5% Solution’ to include their charitable intentions in their estate and financial planning,” said Mary Hinde, leader of the AMCF and president/CEO of the Community Foundation of Northwest Missouri, based in St. Joseph. “Missourians are known for their ‘show-me’ determination. This study shows us what’s possible if we all give a little to support the greater good.”

The 2023 study, conducted for the Alliance by the Center for Civic Research and Innovation at the University of Missouri, updates a previous study from 2013. It notes demographic trends, including Missouri’s aging population with a larger

proportion of the population reaching retirement age, which increases the amount of wealth being transferred between generations.

“Since the 2013 study, we have seen dramatic and transformational examples of the transfer of wealth, particularly in our rural region,” CFO President Brian Fogle said.

“Just in the past three years alone, we have received over \$25 million in planned gifts, the majority being in rural places. We have counties where nearly every high school student can receive scholarship support to continue their education, thanks to legacy gifts. We have nonprofits that will have guaranteed income every year thanks to designated endowments that generous community members included in their estate plans. This study will help us continue to build the concept of including 5% for your community.”

The full study is available at cfozarks.org/transfer-of-wealth.



LEGACY SOCIETY

The following people have made planned giving commitments to benefit the CFO or one of its affiliate foundations from July 1, 2022, through June 30, 2023.

Barton County

Martin and Brenda Bunton

Joplin

Michele D. Sexton, Matthew D. Lonardo and Deandra R. Sexton

Lake of the Ozarks

Russell and Cynthia Martin

Springfield/Regional

Krist Carlson
Bryan K. and Jennifer L. Downer

Taney County

Donna Lee Moon
Mary L. Rigney

Ready to Talk?

For more information on the Legacy Society, please contact Caitlin Golike, director of donor services, at (417) 864-6199 or cgolike@cfozarks.org.

PROFESSIONAL ADVISORS COUNCIL

The CFO welcomed 11 new members to its Professional Advisors Council over the past year. The PAC comprises professionals, including accountants, attorneys, financial advisors, wealth managers and others who help clients fulfill their charitable giving goals. Free membership on the PAC includes an annual opportunity for continuing education credits, invitations to CFO social and educational events, a weekly GiftLaw newsletter, and recognition in CFO publications and on the website. For more information on the Professional Advisors Council, contact Winter Kinne, vice president of development, at (417) 864-6199 or wkinne@cfozarks.org.

Mary Blair — Edward Jones, Nixa
Linda Bowers — Central Trust, Springfield
Richard Cuba — Cuba Financial Group, Cape Girardeau
Bill Duffy — Wells Fargo Advisors, Cape Girardeau
Sydney Hofstetter — FORVIS Private Client, Springfield
Leia Huffman — FORVIS Private Client, Springfield

Devon Klein — Central Trust, Springfield
Carlee Lynn — FORVIS Private Client, Springfield
Roy Merideth — Edward Jones, Jackson
Shelly Titus — FORVIS Private Client, Springfield
Kaytlan Uhlman — FORVIS Private Client, Springfield

'A Labor of Love'

WORK BEGINS TO RESTORE HISTORIC BLACK CEMETERY NEAR WEST PLAINS

Despite traffic that buzzes by, the small grassy spot at the corner of U.S. 63 and Missouri 14 feels silent. An unknown number of stories are buried beneath a couple of trees. Only a sign near a small parking lot confirms you have reached the Sadie Brown Cemetery.

The historic African American site dates to the late 1800s and contains the final resting place for many who took their names and their stories to the grave.

"Now, why were the graves unmarked? It's complicated—but not really," said Crockett Oaks III, who is leading efforts to restore the cemetery and has personal ties to the burial ground. "You're talking about poor folks. You're talking about slaves; some former slaves. Descendants of slaves and first-generation from slavery. Folks just didn't have money, and although tombstones were known, they weren't for us. They were for white people."

Work is now underway at the sacred spot to help those individuals live again through locating and marking more than 100 graves, allowing the cemetery to continue to be used for future burials.

The efforts are made possible in part by a \$22,000 Diversity, Equity & Inclusion Grant from the Community Foundation of the Ozarks. In addition to markers, funding also will help add eight benches for rest and reflection at the cemetery.

West Plains-based Heart of the Ozarks United Way officially requested the funding, and sums up its "why" in the application:

"Descendants will have renewed confidence in their community by the groundswell of support to make the



▲ While headstones mark several burial sites at the Sadie Brown Cemetery, more than 100 graves are unmarked. A Diversity, Equity & Inclusion Grant is helping identify the sites at the historic Black cemetery near West Plains.

◀ Crockett Oaks III grew up in West Plains and recently returned to his hometown. In addition to leading restoration efforts, he serves as associate vice chancellor of business and support services for Missouri State University-West Plains.

cemetery whole. With renewed direction and restoration, families who have lost confidence to be buried at the Sadie Brown Cemetery will be given back part of their family heritage, part of their history, as well as voices lost as a result of poverty and past racism."

While the funding is necessary to make the work possible, it's also propelled by Oaks, whose father—Crockett Oaks Jr.—has long served as the cemetery's caretaker, and whose ancestors are buried at Sadie Brown.

"It's a labor of love."

A place of deep history

I recently met Oaks in his office at Missouri State University-West Plains,

where he works as associate vice chancellor of business and support services. The Howell County seat is where generations of his family have lived and died, where he grew up and where he and his wife recently returned to live.

"My great-grandmother's parents, so it'd be my great-great-grandparents, were slaves in Arkansas, around the Imboden, Arkansas, area," he said, referring to a town about 65 miles southeast of West Plains. "Our name—Oaks—traces back to the plantation owner in the Imboden area.

"There's some folks down there who don't look like me that bear my same last name."

Oaks' work to educate about Sadie

Brown began as a young adult. He shares today that the cemetery was named for Saint Leger “Sadie” Brown, a minister who was once enslaved. He was granted 80 acres in 1891 under the federal government’s Homestead Act and dedicated a portion of his property to be used as a Black cemetery.

Even before Brown owned the property, it was used as a burial ground for Black residents as early as 1880. The land fulfilled a need in the area, which saw an influx of minority residents after the Civil War. They came for a variety of reasons, including jobs with the railroad and in the fruit industry.

“I’ve looked at the census data and you just see after 1882, ’83, ’84, the numbers of African Americans in Howell County, and especially in Dry Creek Township, just began to increase relatively significantly,” said Dr. Jason McCollom, associate professor of history at MSU-West Plains. “But those numbers are never big. They’re never more than maybe one percent of Howell County’s population, but it’s a vibrant community.”

Perhaps it also felt like a place where racial tensions were less severe than other places—but it wasn’t a utopia.

“In West Plains, African Americans were a known entity. Often, they had been here for generations, many of them worked for prominent white families, so they were integral to the economy,” said McCollom. “But on the other hand, we don’t want to minimize this: Segregation was absolutely common. Black folks were considered second-class citizens.”

Just one example: West Plains’ Lincoln School—a small, white building where Black students attended through the 1950s—still stands to remind of a

“There was a **Black presence in virtually every county in Missouri.** The structures that tie people to locations in the Ozarks, if you’re African American, **are few and they’re in danger.**”

—DR. GARY KREMER, STATE HISTORICAL SOCIETY OF MISSOURI

time when equal and separate were considered synonymous.

Those differences are something Carol Silvey also recalls.

Silvey has spent decades in Howell County, serving as a professor of history at MSU-West Plains and in development positions with the college, the CFO and Ozarks Healthcare. She’s also devoted much time to community service, which includes her role as past chair of the MSU Board of Governors.

When she arrived in West Plains in the early 1960s, she was a high school teacher in a classroom where Black students wouldn’t have been accepted a few years prior. There wasn’t significant visible racial conflict—but that fact created a unique challenge, she says.

“There’s really never been tension. I think the Blacks would have been better served had there been a little bit,” Silvey said. “I think tension causes people to realize there’s an issue. As it was, we treated them as individuals, not as a race. I don’t know that you develop an understanding and an appreciation of race when you’re looking at an individual.”

Perhaps peace contributed to a sense of stability, but not complete equality.

“I think one of the dominant reasons why racism never really impacted this community to the point of there being riots and lynchings and things of that sort is because African Americans understood the line,” Oaks said. “They understood the line as evident as the line on this notepad. And they didn’t cross it.”

The evolution of community

When Oaks grew up, West Plains still had a thriving, tight-knit Black community.

Like many Ozarks towns, numbers have decreased as older generations have passed on and younger ones headed out to find new opportunities, just as Oaks and his brother did.

After graduating from high school, Oaks earned bachelor’s and master’s degrees and worked in a variety of occupations, including as a special agent with the FBI and a police officer in Oklahoma City. For more than 33 years, he has trained for a variety of roles as an Army Reserve officer and currently holds the rank of colonel.

That work took him across the country and around the world, but family health challenges ultimately led him back to West Plains in 2021.

“For those that are still here, that sense of community is very much alive and thriving—but it’s an aging fleet,” he said. “It was an anomaly, really, in my community for me to move back.”

Soon after he arrived, his focus fell on Sadie Brown. There were foundational connections which grew in new ways after Dr. Dennis Lancaster, chancellor of MSU-West Plains, asked Oaks and McCollom to give a presentation on Sadie Brown, leading them to discover more of its history.

Visiting the cemetery

I returned to my car and pulled away from Kellett Hall, a historical, red brick former mansion, and took my thoughts on a tour of West Plains.

I stopped at the former Lincoln School, which reminds that history is not away: At least one person who attended this school—Oaks’ father—is still alive.

It eventually closed after the U.S. Supreme Court decided the landmark Brown v. Board of Education case, which ended segregation. Now it’s owned by Oaks, who has plans of transforming it into a cultural center for the community.

I pulled back onto the highway and drove out of town, headed to Sadie Brown. When I arrived, I’m a little embarrassed: I’d driven by countless times and never realized a cemetery was there, let alone its significance.

Walking among the graves, you can see that the installation of new markers is underway. Once complete, they will serve the people who are buried there,

▼ The Sadie Brown Cemetery is located approximately six miles north of West Plains on U.S. 63.





as well as those who remain to see it so.

After all, as the application for the grant funding put it: “Issues of diversity, equity and inclusion are largely invisible or dismissed in Howell County because it’s easy to deny that diversity exists in this predominantly white county. There are also no multicultural venues in the county. The Sadie Brown Cemetery therefore represents a starting point for cultural visibility.”

In some ways, it’s already working to that end. There have been cleanup days to engage the community and a research day with MSU’s Center for Archaeological Research.

In addition to a list of suggestions, the center also recommended that the site be nominated for the National Register of Historic Places.

Impact in the greater conversation

Even though people buried at Sadie Brown are local, the cemetery’s presence is also part of a story that is beyond Howell County.

In the early 1900s, numerous towns across the region saw expulsions of Black residents. That horrific reality, and smaller numbers of Black residents compared with white, results in a limited number of Black landmarks in the overall list of cultural sites across the region.

I recently visited with Dr. Gary Kremer, executive director of the State Historical Society of Missouri, who spoke to the importance of preserving such places.

“They’re important because they remind us of this significant Black presence in those communities at one

time, even though there is no longer that significant Black presence anymore,” Kremer told me. “They simply remind us that African Americans lived all over the state of Missouri, not just in the urban areas or the Bootheel or the Boonslick. There was a Black presence in virtually every county in Missouri.

“The structures that tie people to locations in the Ozarks, if you’re African American, are few and they’re in danger.”

That’s one aspect the CFO grant funding helps support. The \$22,000 grant will first work to restore and remember those buried there by providing grave markers, landscaping and benches at the site.

“In locating those who were buried at the cemetery and ensuring they are remembered for future generations, we are able to honor our Ozarks history,” Bridget Dierks, vice president of programs at the CFO, told me. “Being able to bring back this space for future use helps ensure families may continue to bury their loved ones together.”

The combination of those efforts represents a moment of significance for those buried as well as residents in the present.

“I guess a sense of justice and heart kicked in to want to do something,” Oaks said. “Having the ability, the means, to do something, then we should do that. It’s a way, in my mind, as a son looking at aging parents, to give them the confidence that they need to know that their resting place is going to be cared for and let them see what the Sadie Brown Cemetery could be with a little bit of money, time and diligence.”

—by Kaitlym McConnell

▲ *West Plains’ Lincoln School was a place of education for Black students through the mid-20th century. In early 2023, Crockett Oaks III and his wife, Tonya, acquired the facility and have plans of using it as a cultural center.*

INCLUSION FOR THE WHOLE REGION

For the first time in the program’s history, the CFO’s Diversity, Equity & Inclusion Grants were available to agencies outside of the Springfield metro area. In addition to the \$22,000 grant to **Heart of the Ozarks United Way** to support improvements at the Sadie Brown Cemetery in West Plains, the program funded the following projects:

- ▶ **Better Together Playground:** \$25,000 to support a portion of the purchase and installation of an inclusive playground to serve children in and around the Willard community.
- ▶ **Community Partnership of the Ozarks:** \$5,000 to support the Inclusive Springfield project and the Tough Talks program.
- ▶ **empower: abilities:** \$3,000 to support the Restaurant Access Program by supporting meal costs for volunteer surveyors who will be dining at Springfield-area restaurants to gauge accessibility responsiveness.
- ▶ **History Museum on the Square:** \$20,000 to present the story of Springfield’s African American schools and the organizations supporting the community’s Black educators during segregation.
- ▶ **Ozarks New Hope:** \$13,000 for high-quality DEI training for employees in 11 clinics in southwest Missouri.
- ▶ **Springfield Little Theatre:** \$22,000 to support equitable access to programming for diverse individuals through a partnership between SLT and the Mosaic Arts Collective.
- ▶ **Unity of Springfield:** \$10,000 to support operational expenses for the 2022–23 cold weather season at an inclusive shelter open to all regardless of identity.

The DEI Grant Program, as well as the Inclusion & Belonging Grant Program for smaller requests, is again open to the CFO’s entire service region for the 2023–24 program cycle.



Coover Regional Grants head outside to help

PROJECTS IMPROVE OUTDOOR PLACES IN 11 COMMUNITIES



▲ Robin Mustion, chair of the Hammond Mill Camp's board of directors, is leading efforts to update and maintain the '30s-era camp.

The world headed outside during the COVID-19 pandemic, helping emphasize the value of public outdoor spaces to health, happiness and community togetherness. Yet another reality that was realized was that many of these places across the Ozarks could use some repairs and revitalization—issues that often had been deferred due to significant price tags.

In response to these needs, the Community Foundation of the Ozarks, in partnership with the Louis L. and Julia Dorothy Coover Charitable Foundation and Commerce Trust Company, awarded \$250,000 to 11 projects across the Ozarks that will improve outdoor public spaces for residents and visitors.

“Our communities were reminded of the value of outdoor public spaces during the pandemic. We were honored to be part of spiffing up spaces when local resources were not available in these communities,” says Bridget Dierks, vice president of programs at the CFO. “I very much look forward to visiting some of the newly refreshed playgrounds, parks, and bike trails this year. The CFO, in partnership with the Coover Charitable Foundation, is proud to support this work and pleased at the long-term impact it will have upon rural public spaces.”

Read on to learn about three of

the efforts taking place in the region through this grant program.

Restoring Hammond Mill Camp

Hammond Mill Camp may be tucked away from the world, but it's close to the hearts of generations for whom the destination is a landmark—and part of their lives.

The Ozark County facility, originally built in the 1930s as a Civilian Conservation Corps camp, has hosted decades of youth camps, family reunions and community events. For some locals, memories made in the wooded world of its own don't end: Once attendees as children, they continue coming back for events as adults.

Yet while memories may be rich, they don't pay for upkeep. Over time, maintenance needs at the camp have grown. As an example, the roofs covering the bath house and dining hall must be replaced. In one instance, a damaged spot is covered with bricks.

Those particular issues will soon be addressed through a nearly \$25,000 grant from the Coover Charitable Foundation. Work on the roofing project is expected to conclude before camps begin this summer.

“I think it's important for the youth,” says Robin Mustion, chair of the Hammond Mill Camp's board of directors, of

the camp's purpose. “I think that (the original goal) was to provide a place where people could come and children could come and spend time safely away from the world.

“And, I mean, look at the distractions in the world now. You come here, you don't have internet, which for young people is a challenge. But it's wonderful, because then they're focused on their camp or their families.”

A gazebo and garden in Stotts City

Once described by an Ozarks newspaper as “the flower of Lawrence County,” the town of Stotts City began in the lead-mining haze and days of the late 1800s. More than 125 years later, it's still home to about 200 people, but a stroll through town shows a place where time has not been kind, and where drug issues have been identified. Yet, recent efforts offer reason for hope.

Two examples are apparent through the restoration of the town's historic gazebo, and the addition of a community garden. Both are funded by a \$25,000 grant from the Coover Charitable Foundation.

“We know that a holistic approach to addiction and recovery is what makes (recovery) be lifelong and makes it generational for their kids. That's why



◀ Following grant-funded improvements, Stotts City's historic gazebo will once again host concerts and events.

▲ Dr. Eric Allen, superintendent of Eminence School District, will be able to replace aging playground equipment.

we applied for the grant,” says Rachel Luebbering, executive director with the Monett-based Coalition of Charities, which officially received the grant.

The native-stone gazebo has been a landmark for years and is a “source of pride for those that are from Stotts City,” says Luebbering. Work includes repairing the roof, the existing rock and woodwork, and adding some paint, making it usable once again for concerts and other activities.

Across the street, a park and community garden will soon grow on a grassy area near City Hall. The grant will help cover expenses related to the materials, as well as a picnic table and benches, raised garden beds, soil, seeds, supplies and a greenhouse.

In addition to public use during daylight hours, the amenities will be of specific focus during community events such as town block parties, holiday festivals, and when visitors come to town for its annual tractor pull and Fourth of July celebration.

Eminence's playground equipment

The eastern Ozarks town of Eminence is home to about 600 people, but it's a number that swells considerably during summer months. Every year, tourists come to town in search of

natural beauty and the Ozark National Scenic Riverways.

While the community is rich in stunning scenery, extra dollars tend to be fewer and far between. An example is the Eminence School District's athletic complex, where playground equipment was rapidly aging—but not in any budget for replacement.

An answer to that need came through a \$25,000 grant from the Coover Charitable Foundation, which provided funding to replace the equipment. It's a support for the district with about 260 students, more than 60% who qualify for free and reduced lunches, an indicator of a district's poverty level.

“This was never going to be a district priority,” says Dr. Eric Allen, superintendent of the Eminence district, of replacing the equipment. “This is never going to supersede putting a roof on the elementary, or every three years we get a new bus. This was never going to get ahead of those types of things, especially not being our main playground.”

Once the aged structures are replaced, they will offer a greater resource for families at sporting events and for tourists. It could also potentially serve kids in the neighborhood who might want a place to play within easier walking distance than the school's playground.

—by Kaitlyn McConnell

CELEBRATING PUBLIC SPACES

In addition to the projects featured here, eight agencies were supported by the Coover Regional Celebration of Public Spaces Grant Program:

- ▶ **City of Ava:** \$24,479 to improve the municipal park in the Douglas County seat with ADA-compliant, inclusive equipment and a two-bay swing set.
- ▶ **City of Buffalo:** \$13,850 to renovate restrooms and add baby-changing stations at the public park in the Dallas County seat.
- ▶ **Douglas County Council on Aging:** \$22,070 to build accessible, raised community garden beds where seniors can grow produce.
- ▶ **Eleven Point Valley Community Center:** \$25,000 to create a new playground in the Oregon County community of Thomasville where the playground was destroyed in 2017 flooding.
- ▶ **Greenfield R-IV School District:** \$21,722 to build a community garden space at the elementary school in Dade County.
- ▶ **Niangua TLC:** \$25,000 to complete fencing around the playground and improve security for pre-K through 8th-grade students.
- ▶ **Oak Hill R-1 School District:** \$25,000 to upgrade playground equipment and resurface the walking trail at the rural Dent County school.
- ▶ **Ozark Greenways:** \$18,078 to improve flood-damaged sections of the Frisco Highline Trail in Polk County.

To learn more and read expanded versions of these stories, visit cfozarks.org/coover2023.

A Final Word

A NOTE FROM CFO PRESIDENT BRIAN FOGLE

Editor's Note: Brian Fogle, the CFO's president and CEO since 2008, announced to the Board of Directors and staff earlier this year his intention to retire in late 2023 or early 2024. His announcement set into motion a planned succession to ensure a smooth leadership transition for the region's largest public charitable foundation. The CFO's governing officers, led by Board Chair Dean Thompson, have engaged Scion Executive Search to conduct the hiring search. For more information, go to cfozarks.org/careers.

As years have passed, I have noticed my definition of “contemporary” has apparently expanded. I have taught banking classes for the Missouri Banker’s Association now for nearly 40 years. I will tell a story or share a quote to relate to the younger students, only to have them stare at me with puzzled faces, having no idea what I’m talking about. I say that as an introduction to a quote from Jack Handy’s “Deep Thoughts,” which to me came out last year instead of three decades ago:

When the age of the Vikings came to a close, they must have sensed it. Probably, they gathered together one evening, slapped each other on the back, and said, “Hey, good job.”

Some of you know by now that I have formally announced my retirement from the CFO, and the search for the successor is underway. There is no single thing that has contributed to my decision, but certainly a major contributor was experience in seeing other leadership transitions. Timing is always tricky, but I’ve seen some leaders stay too long, and I am very sensitive to that. I do love coming to work every day, and working with such great colleagues, board members and communities across central and southern Missouri who help us advance our mission of improving the quality of life of all people in the region. I also know that work will continue passionately, and the Board of Directors will select the very best successor, who will hopefully be identified and able to join in November or December. The plan, then, is for me



to be available to help with the transition for a few months afterward.

“If the creek don’t rise,” as we say in the Ozarks, I do plan on one more chapter professionally, but don’t yet know what that may be. As many know, I do love thoroughbred racing, so might explore being a jockey, considering I’m much too young to run for president now. I will have time to think about that, but plan on spending the next several months slapping folks on the back and thanking them with: “Hey, good job.”

It is bittersweet, most certainly, to write this final Final Word. Most readers have noted that I love quotes, and there are so many I could use. But I’ll close with one paraphrased from a favorite poet, Ogden Nash:

*Here lies my past, goodbye, I have kissed it.
Thank you, friends, I wouldn’t have missed it.*

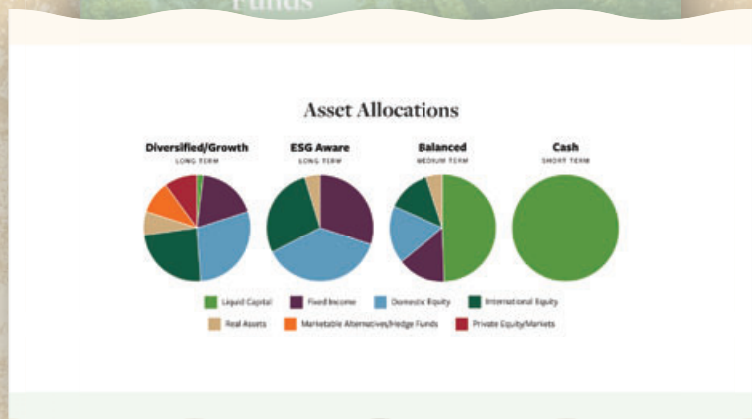
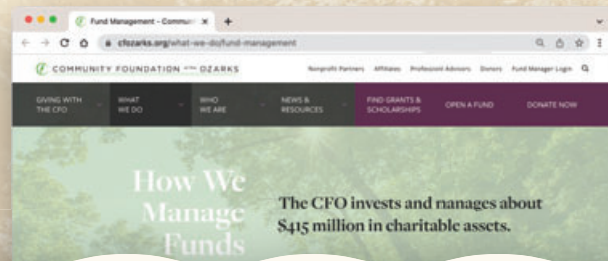
▲ In June, CFO staff presented Brian with a one-of-a-kind addition to his signature collection: A bowtie emblazoned with the CFO’s 50th anniversary logo.

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With the recently updated Investment Policy Statement, donors, nonprofit partners and other fundholders now have more options for how their charitable funds are invested.

Find details about these options, the latest performance reports, info on the CFO's Investment Advisory Board and more at cfozarks.org/investments.

Questions? Contact your fund steward or call (417) 864-6199.



CFOZARKS.ORG/INVESTMENTS



PARTING SHOT: *The first of many golden waves washed across the region this spring as 50,000 daffodils, planted last fall by volunteers in Springfield and more than 40 affiliate communities, bloomed to launch the CFO's golden anniversary celebration.*

At Springfield Botanical Gardens at Nathanael Greene/Close Memorial Park, several thousand bulbs were planted near Lake Drummond and the statue of Anne Drummond. As a fierce advocate for the formation of the CFO in the early '70s, Drummond is considered an honorary founder. A bronze sculpture of her likeness has watched over Lake Drummond for many years. As the daffodils that surrounded the sculpture began to fade, garden volunteers and park visitors dropped recently spent daffodil blooms in the lap of her statue as tokens of appreciation for her life's work as a community champion.

Daffodils were selected for this special anniversary celebration because they naturally spread and multiply over time as a symbol of place-based philanthropy and planned giving. For more information about where you can find the special anniversary daffodils next year—and for years to come—visit cfozarks.org/daffodils.

