

PASSION & PURPOSE

THE CFO MAGAZINE  SUMMER 2018



45 Years & A Bright Future

Annual gathering honors early days of the foundation and looks ahead to the future of generosity in the Ozarks. **PAGE 6**



COMMUNITY
FOUNDATION
of the OZARKS

CONNECTING PASSION TO
PURPOSE SINCE 1973

CFO Affiliate Program Turns 25

1993–94 Board Chair
Art Haseltine remembers
start of regional work.

PAGE 11

“He Was a Giver”

The parents of Cash
Moore continue their
son’s loving legacy.

PAGE 18



OUR MISSION

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

We are committed to excellence through exceptional service, built on the following core values:

INTEGRITY: Stewardship you can trust.

RESPECT: Relationships matter.

LEADERSHIP: Collaboration creates solutions.

VISION: Our focus is forever.



COMMUNITY FOUNDATION of the OZARKS

Connecting passion to purpose.

PASSION & PURPOSE is an annual publication of the Community Foundation of the Ozarks, a public charitable foundation founded in 1973, now representing the region of Missouri south of the Missouri River. For more information, call (417) 864-6199 or email cfo@cfozarks.org.

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PASSION & PURPOSE

SUMMER 2018

LETTER FROM THE CHAIR 2

CFO NEWS 2

OUTGOING & INCOMING BOARD MEMBERS 3

ASK THE EXPERTS 4

GIVING BY THE NUMBERS 5

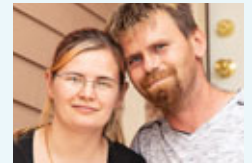
Celebrating 45 Years 6

Key figures from the CFO's history commemorate the anniversary at the annual Donor Dinner



At Home in Zone 1 8

One family's success story illustrates the progress made by The Northwest Project in reducing poverty



AFFILIATES 10

AGENCIES 14

DEVELOPMENT 16

PLUS: Remembering Jewell Thompson Schweitzer 17

PROGRAMS 20

A FINAL WORD 24



About the Cover

The Chair's baton was passed from Jeff Schrag, right, to Robin Walker at the 2018 annual meeting. As a token of thanks for his service to the CFO, Schrag—the owner of Mother's Brewing Co.—was presented with a bright, vivid display of the CFO logo in the style of a classic brewery neon sign.

Letter from the Chair

A NOTE FROM OUTGOING BOARD CHAIR JEFF SCHRAG

More by coincidence than design, the CFO's 45th anniversary year has been one of re-imagining the foundation for decades to come.

It was definitely an intentional effort, one I supported as the priority for my year as the board chair. It is not very often that people or organizations take the opportunity to re-make themselves before there is a crisis. The CFO is taking just such an opportunity.

This process started with the Leadership Team's recognition in 2016 that it was time for some succession planning with several key retirements anticipated within the foreseeable future. The CFO engaged a consulting firm that specializes in community foundations, whose report was more of an organizational assessment than a succession plan. The CFO implemented a number of changes, including last fall's staff reorganization, to make the office structure and job descriptions more accurately reflect how the staff works today.

The report also suggested the CFO undertake an activity-based cost analysis to better understand its true costs and income streams.

A board committee reviewed that wealth of information to align fees and services more closely with expenses and revenue. While the CFO is a nonprofit foundation, our goal is to ensure its operating model is sustainable for the generation that follows us.

Change that is driven by us is thrilling. Change that is imposed upon us is frightening.

As we continue to drive change and to chart the CFO's future, we can see the finish line, but we have not crossed it. I am very appreciative of my board colleagues who have donated even more of their time and professional expertise than usual during a very busy year.

I also want to thank the CFO staff. They have done a marvelous job of navigating consultant recommendations and board-directed changes while continuing the day-to-day work of the foundation—all without missing a beat.

I have learned an enormous amount over the past year as chair. This includes the intricacies and nuances of fees and fund types and the wide variety of products and services used to serve this diverse region. What I didn't realize was the



depth of relationships built over these 45 years between the staff and donors; or how often the CFO is asked to be at the table for community leadership priorities. I didn't realize the CFO receives enough change from fundraisers and school events to necessitate a new change-sorting machine because the last one wore out. My year as chair has given me great appreciation for how much our collective charitable dollars fuel our region's safety nets, environment, arts and education. I've realized how much more I came to appreciate the modest contribution and how far even a small donation can go to making the world a better place.

Cheers,

—Jeff Schrag

FY19 CHAIR EMERITUS

CFO News in Brief

Law professor headlines PAC education program

One of the value-added opportunities for members of the CFO's Professional Advisors Council is the annual continuing education program available at no cost to PAC members.

In May, David English, Professor of Law at the University of Missouri, presented a session on "Recent Developments in Estate Planning."

His session focused on three areas: key provisions of the 2017 Tax Cuts and Jobs Act; recent Missouri legislation relevant to estate planning; and important cases decided under the Missouri Uniform Trust Code.

The next continuing education session will take place this fall with guest speaker Bryan Clontz, founder of Charitable Solutions LLC,

who also will present at the CFO's annual Affiliate Appreciation Conference. (See page 12.)

For more information about joining the Professional Advisors Council, contact Winter Kinne at wkinne@cfozarks.org.

CFO staff updates

The CFO announced a staffing change in July. **Matt Lemmon**, who has served as Media Director and Director of Communications and Marketing since 2011, resigned to take a communications leadership position at Burrell Behavioral Health Center in Springfield.

Lemmon has had primary responsibility

for the CFO's Cause Momentum crowdfunding platform and the three Give Ozarks days, which raised about \$3.6 million for regional nonprofit agencies. He also worked closely with the CFO's Affiliate Foundations along with handling media relations, publications and websites.

Aaron Scott joined the CFO in July as the Director of Communications and Marketing. Scott worked for the Springfield Business Journal before pursuing his own freelance business. His clients included the CFO and he has been responsible for the CFO's principal photography, brand and visual identities since 2013.



Farewell to outgoing board members

THE NEW FISCAL YEAR BRINGS goodbyes and hellos on the Board of Directors. The CFO is governed by a volunteer board that represents the interests of Springfield and the region; these 21 members bring knowledge, expertise and guidance from their respective professional fields, their other volunteer interests and the places where they live. This year's outgoing board members have particularly long histories with the CFO's work and we are deeply grateful for their service:

Rob Foster chaired the CFO board in 2016-17 before serving a 7th year to fulfill his role as Chair Emeritus.



He has been a president and board member of the Marshfield Area Community Foundation for many years, guiding the growth of the MACF's signature fundraiser, Boots, Bands & Barbeque. The owner of Arch Contracting, Foster also has chaired the CFO's Scholarship Committee for a number of years and has served on the Governance, Coover and Regional Committees.

Brian Hammons is a founding member and former president of the Stockton Community Foundation and then served six years on the CFO board. His multi-generation family business, Hammons Products, has established several funds to benefit Stockton through its corporate grantmaking, employee benevolence and community leadership development. He also has served on the Coover and Regional committees.



Dr. Chris Neale represented central Missouri as the former president of the Community Foundation of the Hermann Area, Inc., when he also served



as superintendent of Hermann schools. He has since been named an assistant commissioner for the Department of Elementary and Secondary Education in Jefferson City, so is unable to serve a second term.

Stephanie Stenger Montgomery served as the board chair in 2015-16 and is completing seven years of service. She also chaired the Northwest Project grant committee and serves on Governance and several other grant committees. A Springfield attorney, she is active with several nonprofits, including chairing the boards of the Moxie Cinema and Care to Learn and previously Isabel's House Crisis Nursery. She is active in her family's supporting organization, the Lezah Stenger Foundation.



Lynn Tynes, who worked in the psychology field, is an active community volunteer and previously served as president of the Junior League of Springfield. She was a leader in the JLS through the development and opening of Isabel's House Crisis Nursery of the Ozarks, which is now an active Agency Partner. Her family has been longtime supporters of the CFO.



Incoming Board Members

The CFO also welcomes five new board members appointed to three-year terms that began on July 1.

Springfield attorney **Debbie Shantz Hart** is the co-founder of Housing Plus, an affordable housing development company that seeks strategic nonprofit relationships to support tenants' efforts to break the cycle of poverty. She previously chaired the Springfield Area Chamber of Commerce Board of Directors.

Retired banker **Ron Kraettli** serves on the

Board of the Community Foundation of the Hermann Area, Inc. His volunteer leadership also extends to the Hermann Area Chamber of Commerce, the Hermann Regional Economic Development Corp. and the Meramec Regional Planning Commission.

Susan Krauss is a founding member of the Perry County Community Foundation, one of the CFO's newest affiliates established in 2014. Owners of Liberty Glass, Susan and her husband, Anthony, have established a family fund.

Megan Morris of Springfield is a Foundation and Philanthropy Advisor for Bass Pro Shops, working on the company's philanthropic, community and conservation programs. She has served on the Metro Springfield Collective Impact grant committee.

Kelly Parson is the President of OakStar Bank in Bolivar. He also serves as President of the Bolivar Area Community Foundation. He remains involved as a fourth-generation farmer on his family's Bolivar-area farm.

Executive Committee

The following board members will serve as officers for the FY19 Executive Committee:

- **Robin Walker**, Chair; Monett
Walker Asset Management
- **Abram McGull II**, Vice Chair; Springfield
U.S. Attorney's Office
- **Rhonda Christopher**, Treasurer; Springfield
BKD Wealth Advisors
- **Ron Penney**, Secretary; Springfield
Penney, Murray & Associates wealth advisors
- **Jim Holt**, At-large; Reeds Spring
Retired Educator; President of the Table Rock Lake Community Foundation
- **Morey Mechlin**, At-large; Springfield
Civic volunteer; retired Care to Learn Executive Director
- **Randy Howard**, Investment Advisory Board
Chair; Aurora
Retired Edward Jones financial advisor
- **Jeff Schrag**, Chair Emeritus; Springfield
Owner of The Daily Events and Mother's Brewing Co.

Tax Reform & Donations

The new tax law hits the books this year with potential impacts for both benefactors and beneficiaries

Despite being the middle of summer, conjure up George Bailey for a moment.

The protagonist of the classic “It’s a Wonderful Life” was a loan officer, not a donor or a grant maker. But the idea of what would happen but for the generosity of charitable donations is worth contemplating in 2018’s landscape.

George’s guardian angel Clarence might describe a community where kids are going hungry, or without school clothes or Christmas presents. He might imagine unwanted cats and dogs roaming freely, having litters unchecked. He might warn of older or vulnerable townspeople not receiving the support they need.

It’s a vision that’s still quite murky until the impact of the sweeping tax reform laws brings more clarity. The predictions of how tax reform will affect charitable giving vary widely, but most aren’t rosy. The conservative-leaning American Enterprise Institute predicts a decline of more than \$17 billion in charitable giving nationwide in 2018. The liberal-leaning Brookings Institution estimates a 5 percent decrease in charitable giving with about 21 million taxpayers foregoing a charitable deduction for the new standard deduction.

Through May 2018, the CFO has not experienced any decline in giving; in fact, giving is up through the first five months compared to 2017. But most giving incentivized by tax deductions occurs in the final quarter of the calendar year.

“The Ozarks has always been a generous place, but not a wealthy one,” says CFO President Brian Fogle. “Our culture is for neighbors to help neighbors. We are the 72nd largest community foundation in the country, but the 10th busiest in terms of number of gifts. That statistic reflects who we are in this unique region.”

So what is clear is that the need for nonprofit services supported by the generosity of individual, corporate and foundation donors and grant-makers is as strong as ever. Nonprofit partners are working to provide and plan in an era of uncertainty coupled with demand for services.

The CFO asked several professional advisors who are members of the Board of Directors to weigh in on the strategies they’re recommending to clients and potential impact of tax reform here in the Ozarks.



RHONDA CHRISTOPHER
BKD WEALTH ADVISORS



DON DAVIS
COMMERCE TRUST CO.



GARY POWELL
SPENCER FANE

What are you seeing as the initial impact of tax reform on charitable giving?

CHRISTOPHER: The initial impact I’ve seen with my clients has not been whether to gift or not, but how to strategize to maximize any potential tax benefits due to the larger standard deduction. The discussions have included the concepts of “bunching” gifts for multiple years through larger gifts in alternating years or contributing to a donor-advised fund, and the strategy of gifting IRA Required Minimum Distributions through a Qualified Charitable Distribution.

DAVIS: Many clients are still unsure of how their tax situation will play out in 2018. What this seems to be causing is paralysis ... Most of our clients, in the Ozarks, are charitably inclined and give because they want to give to their community. The tax benefit is important, but not the driving part of the decision to give. That said, they are waiting to get more clarity on their particular tax situation. I believe we will see more of a “back-loaded” year in giving once people are more comfortable with how they are fully impacted by the recent tax reform.

How concerned are your clients about their charitable giving under the new tax laws?

POWELL: The tax incentives for charitable giving have certainly diminished. For most people, charitable giving at death produces no tax benefit, due to the very high estate tax exemption amounts. On the income tax side, the substantial increase in the standard deduction and the elimination or reduction of itemized deductions other than charitable contributions

certainly reduces the ability to receive a tax benefit for the contribution. However, having said that, I do not see people reducing their charitable contributions. Rather, I see a more planned approach toward charitable giving, especially if it is substantial giving.

CHRISTOPHER: Clients gift because they have a charitable intent, and that hasn’t changed. It has become more beneficial now, though, to be thoughtful in the timing of the gifts and the method used. I would advise my clients to consult their tax preparer or wealth advisor.

How strongly do you think the prospect of tax deductions influences your clients’ charitable giving decisions?

POWELL: I think that the ability to take a tax deduction with respect to a charitable contribution is certainly a factor to many people in deciding on the amount and timing of the contribution. But overall, I do not think it is the decisive factor. The tax benefit is generally the “gravity” with respect to the charitable contribution. On the other hand, I can see situations where people will pay much more attention to the timing issue with respect to their proposed contributions, and purchase the vehicle they use for those contributions (such as donor-advised funds).

What else would you like to add?

POWELL: New tax laws always develop new tax strategies. New tax laws produce a new tax paradigm and charitable organizations and donors have to re-adjust their approaches in order to still achieve their basic goals.

Giving at a Glance

The annual Columbus Survey is considered the “census of the Community Foundation field.” It is administered annually by CF Insights, operated by the Foundation Center, a leading source of information about philanthropy. The 2017 report was released in late June. The CFO’s responses were based on data from June 30, 2017, the fiscal year end, and ranked among 261 other community foundations from across the country.

FY17 ASSETS: \$263,480,684

RANK: **72**

DISTRIBUTION RATE: 16%

(TOTAL GRANTS BY TOTAL ASSETS)

RANK: **18**

NUMBER OF

TRANSACTIONS: 25,364

(GIFTS AND GRANTS PROCESSED IN FY17 — AN AVERAGE TRANSACTION SIZE OF \$3,141)

RANK: **10**

GIFTS PER CAPITA: \$48.46

(TOTAL GIFTS BY POPULATION OF THE SERVICE AREA)

RANK: **75**

IN THE NEIGHBORHOOD

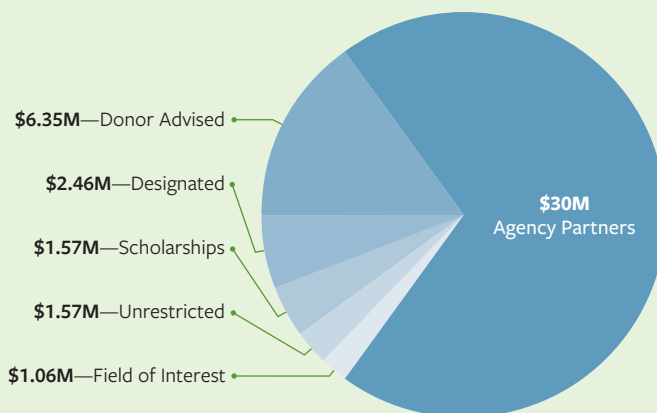
The 10 closest community foundations to the CFO, ranked by assets:

- 67: Toledo Community Foundation
- 68: Community Foundation of Western North Carolina
- 69: Stark Community Foundation (Canton, Ohio)
- 70: Community Foundation of Elkhart County (Indiana)
- 71: Community Foundation for Monterey County (California)
- 72: **Community Foundation of the Ozarks**
- 73: Amarillo Area Foundation (Texas)
- 74: Erie Community Foundation (Ohio)
- 75: Coastal Community Foundation of South Carolina
- 76: Fremont Area Community Foundation (Michigan)
- 77: Madison Community Foundation (Wisconsin)

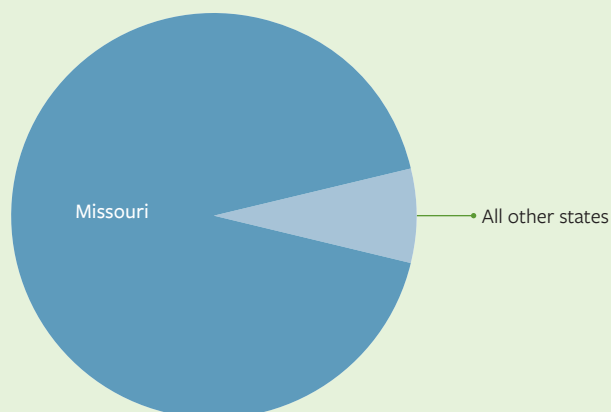
FY18 Grant Distributions

Data as of May 31, 2018

Distributions by Type



Distributions by State





A Cause for Celebration



▲ Jan Horton, the CFO's first employee hired as Executive Director in 1988, and later made President, was one of a number of people honored as key figures in the CFO's history.



▲ Outgoing Chair Jeff Schrag addresses the gathering of donors, board members and important figures from the CFO's history.

▶ Incoming Chair Robin Walker, right, draws a ticket for one of 10 \$450 surprise grants given to guests to benefit their organization of choice.

IN 1973, 15 SPRINGFIELD BANKERS agreed to invest \$100 each to seed this new idea in town called a community foundation. If they could see their return today, they would surely agree they made a good investment.

Their ROI has been about 35 percent annually every year for 45 years with the Community Foundation of the Ozarks' assets now at nearly \$300 million.

Perhaps even more significant, as of June 2018 the CFO has returned more than \$350 million in grants and distributions back to the people and communities in its large service area covering 58 counties south of the Missouri River. It was just seven years ago in 2011 when the CFO reached the \$100 million mark.

That's one of the milestones the CFO is celebrating in its 45th anniversary year. At the annual donor dinner in June, a much-needed downpour upon arrival culminated with a festive toast and a surprise drawing to give 10 donors the opportunity to grant \$450 each to a favorite charitable cause.

In between, outgoing Chair Jeff Schrag and incoming Chair Robin Walker, with President Brian Fogle and other staff members, hosted an evening to mark these milestones:



45-Second Video Contest Winners

To celebrate the 45th anniversary with nonprofit partners, the CFO invited 45-Second Video proposals for two \$4,500 grant awards. The video proposals went through a first-round public voting process where about 8,000 votes were cast.

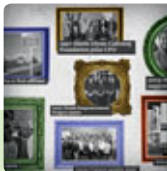
► The regional winner was the Carl Junction Education Foundation for inclusive playground equipment. Taking a celebratory selfie is Tracie Skaggs, left, who was joined by Heather Linscheid to accept the grant from Winter Kinne, vice president of development.

▼ The Springfield grant was awarded to the Springfield-Greene County Library Foundation to purchase books to supplement the Library's summer reading program. Library District Executive Director Regina Greer Cooper, left, and Library Foundation Development Director Melissa Adler accept the grant from Winter Kinne.



- The Louis L. and Julia Dorothy Coover Charitable Foundation exceeded \$5 million in grants with its 2018 awards for rural-focused and place-based education proposals. The Commerce Trust Co., which manages the Coover Foundation, has partnered with the CFO since 2002 to run the grant program. See page 21.
- The Affiliate Program also is marking its 25th anniversary this year. In 1993, then Board Chair and Nixa Attorney Art Haseltine wanted to expand the Foundation's work into Nixa. The concept of volunteer-led affiliate foundations has now spread to 49 other locations. For more, see page 10.
- Along with donors and affiliates, the CFO works with more than 600 nonprofit agencies. To celebrate those partners, the CFO offered two \$4,500 grants for video proposals, detailed above.

But, as Walker noted in his toast: "It's you, our donors, without whom we simply wouldn't exist. Thank you!"



The CFO debuted an animated video telling the story of its 45-year history. The video was produced with Springfield's Blend Studio partner Brandon Goodwin, one of the first high school students to participate in the CFO's Youth Empowerment Project. To see the video and other anniversary highlights, visit: cfozarks.org/45.

◀ In addition to the CFO reaching 45 years, the Affiliate network is celebrating 25 years since the Nixa Community Foundation, represented at the dinner by Sharon Whitehill Gray, became the first regional partner in 1993. Affiliate representatives at the annual dinner received gifts to symbolize the roots they've planted in 49 cities, communities and regions across the CFO's service region.

NORTHWEST PROGRESS

Year Two of the The Northwest Project saw positive growth in Springfield's Zone 1, for the program and participants alike

A HOME IS THE BIGGEST purchase a person will ever make, or so the saying goes.

James and Christine Shotts know the feeling well. But when they—along with a handful of their eight children—cut the ribbon on their new six-bedroom, two-and-a-half-bath Habitat for Humanity home on May 2, it was just was more than a move. It was a new lease on life, and a major step on a journey that has transformed the family's fortunes—literally and figuratively—with help from the CFO's Northwest Project.

At the April meeting of the CFO's Board of Trustees, James and Christine—with an introduction from former banker, Drury University president and CFO Board Chair Todd Parnell—shared how they have become more active in their Grant Beach community, erased thousands of dollars in debt and improved their credit scores thanks to The Northwest Project and Parnell's financial mentorship. (James has raised his credit score from 631 to an astounding 794. Christine, who didn't have a credit history when she began, now has a score of 650.)



James admitted he originally was skeptical of The Northwest Project and its group-based programs—which follow the CIRCLES model—that engage entire families in efforts to end cycles of poverty.

"I've been thrown down the hard trail so many times that I'd given up on programs," James Shott told the CFO board.

But after six months of Christine attending meetings solo, he'd seen the difference and was ready to bring the whole family in The Northwest Project programming at The Fairbanks.

The Shotts are a shining example of what the CFO, the Stanley & Elaine

Ball Foundation (managed by Central Trust) and the Musgrave Foundation were seeking to accomplish in 2016 when they funded a collaborative proposal led by the Drew Lewis Foundation, Missouri State University and Drury University to implement The Northwest Project in Springfield's northwestern Zone 1 quadrant. In April, the program marked its second anniversary with its annual report and a Community Summit, which featured panels of civic and nonprofit leaders discussing poverty in Zone 1 and ways to address it.

Amy Blansit is executive director of



THE NORTHWEST PROJECT

About The Northwest Project

The goal of The Northwest Project is to pilot strategies over a five-year period to help families overcome the challenges that have kept them living in poverty and sustain their long-term success in emerging from those circumstances. The CFO selected northwest Springfield for this project because much of the area exceeds the city's overall 25.6 percent poverty rate.

The CFO has made its year-three grant to the collaborating groups—led by The Drew Lewis Foundation, Missouri State University and Drury University. The funders' total investment during the

five years of The Northwest Project is expected to reach \$1.3 million.

For more information:

- To read the Year 2 annual report, watch a video about CIRCLES programming at the Springfield Dream Center and to find quarterly updates, please visit cfozarks.org/northwest.
- To learn how you can volunteer, please contact The Drew Lewis Foundation at (417) 720-1890.
- To hear KSMU's Mike Smith's interview with The Northwest Project participant Ginger Ramirez, please visit ksmu.org/making-difference.



Larry Peterson, executive director of Habitat for Humanity of Springfield, hands over the keys to James and Christine Shotts at a ribbon-cutting ceremony for their new house on May 2. The Shotts attended programming supported by The Northwest Project.

the Drew Lewis Foundation, which owns and renovated The Fairbanks, the facility that serves as the Grant Beach hub for the Northwest Project. The 2013 investment Blansit and her late husband, after whom the foundation is named, made in their own Grant Beach neighborhood was a harbinger of the tireless work she would later put in to improve Springfield families.

“By saving a building we began a process of saving a neighborhood, and became a part of what is changing in our community,” Blansit told a group of 50-plus CFO funding partners at April’s Funders’ Forum

luncheon. The event was held at the Springfield Dream Center, which serves as the Woodland Heights hub for CIRCLES and Northwest Project programming, in addition to other community uses.

What started at The Fairbanks grew in the project’s second year to three other Zone 1 neighborhoods, including the Dream Center. Other “hubs” provide the Heart of the Westside and Robberson areas with a walkable location, child care, free “family style” meals six nights a week and additional resources that supplement the financial, employment, educational, emotional and resiliency factors addressed at cohort meetings.

Now that the Shotts have completed official Northwest Project programming, they say it’s the community aspect of the process that they carry with them.

“I always knew people were in the same situation, but now I know there are others trying to get out,” James said.

Christine added: “It was nice to be able to open up to colleagues and get positive feedback, and not be judged.”

Outside their new home, a cluster of children’s handprints in freshly dried concrete serve as a reminder of the stakes involved in providing a new home for their large family, and as a celebration of how far the Shotts have come with the help of a caring community.

It’s true: Purchases don’t get any bigger than that.

The Northwest Project By the Numbers

- ▶ NWP participant retention rate is **76%**.
- ▶ Reporting families have reduced collective debt by **\$313,000**.
- ▶ Reporting families have increased monthly income by a collective **\$15,000** and annual income by **\$180,000**.
- ▶ The average NWP family lives at **86%** of the state poverty level.
- ▶ Since it started, **16 FAMILIES** have moved past the 100 percent poverty level, and **ONE FAMILY** is now at more than 200 percent the poverty level, which is the NWP goal.
- ▶ **78%** of NWP families have improved their income relative to the federal poverty level.
- ▶ More than **600 VOLUNTEERS** have given more than **2,000 HOURS** to families in need, a workplace value of **MORE THAN \$46,000**.
- ▶ **75 BUSINESS** have contributed or donated **MORE THAN \$300,000** in services and resources.
- ▶ The average credit score for NWP participants has **RISEN FROM 484 TO 607**, with 620 being the NWP goal.
- ▶ **2,296 MEALS** were served in NWP Year 2, more than half of them to children.

Source: Northwest Project Year 2 annual report

The Shotts’ new home is less than a block away from the Drew Lewis Foundation’s Fairbanks community center in the Grant Beach neighborhood.



A Regional Vision Realized

THE CFO'S AFFILIATE NETWORK CELEBRATES 25 YEARS OF COMMUNITY BETTERMENT IN TOWNS BIG AND SMALL ACROSS SOUTHERN MISSOURI

In the Community Foundation of the Ozarks' community room, two long shelves on the wall hold some three dozen photos, portraits of the men and women who have served the all-important role of board chair during the CFO's 45 years in the Ozarks. Toward the beginning - number of 11 of 35 - to be exact, you'll find Art Haseltine, the Springfield attorney who served as chair for the 1993-94 fiscal year.

During that year, Haseltine ran point for one of the most critical decisions the CFO has ever made, one that charted a new, more expansive course for the foundation. Haseltine, of course, doesn't take credit. But as board chair, he figured heavily into the call to expand the CFO's mission beyond Springfield and Greene County for the first time, establishing the

first affiliate foundation just down Highway 160, in Nixa.

A quarter of a century later, it remains one of the lynchpin decisions in the CFO's history.

For his part, Haseltine credits CFO staff at the time—President Jan Horton and CFO Susanne Gray—as well as former board chair Mary Kay Meek for the success of the Mott Challenge, which provided \$2 million to the CFO's coffers and made expansion a real possibility. Subsequent advice from a visiting consultant, who also served as the head of a community foundation in Kalamazoo, Mich., opened the

board's eyes to expanding to surrounding cities and towns.

"It occurred to me that it was something we could do here," Haseltine said. "If we had a hard time getting to the point

where we could have full-time staff in Springfield, how would smaller communities be able to do it?"

The decision to make Nixa the first affiliate was both strategic and fortuitous. A city of five or six thousand people at the time, most projections saw Nixa growing to near 20,000 in coming decades, a prediction that has proven true. Community and business leaders like Bill Foster and George Johnson embraced the idea. A banker and leader from another Ozarks boomtown, ex-Branson mayor Stanley Ball, agreed to serve as the Nixa Community Foundation's first board chair. Springfield board members Rob Baird and Meek provided matching funds to seed the Nixa foundation. And the CFO's affiliate program was off and running.

"We thought, hey, if it has merit, it'll take off," Haseltine said.



CONTINUED ON PAGE 12

Art Haseltine served as CFO board chair for the 1993-94 fiscal year. During that time, the Nixa Community Foundation was established, marking the beginning of the program that now stretches to 49 affiliates foundations.



CFO affiliate foundations and establishment dates

1993

Nixa Community Foundation,
Nov. 18, 1993

1998

Lockwood Community Foundation, Feb. 25, 1998
Greater Seymour Area Foundation, Aug. 13, 1998
Monett Area Community Foundation, Sept. 3, 1998
Dallas County Community Foundation, Oct. 28, 1998

1999

Carthage Community Foundation, May 24, 1999
Benton County Community Foundation, August 1999
Hickory County Community Wellness Foundation, Dec. 11, 1999
Dent County Community Foundation, Dec. 22, 1999

2000

Truman Lake Community Foundation, May 15, 2000*

2001

Willow Springs Community Foundation, March 15, 2001*
Finley River Community Foundation, May 17, 2001
El Dorado Springs Community Foundation, May 22, 2001

2002

Community Foundation of Taney County, April 23, 2002
Stockton Community Foundation, May 2, 2002
Bourbon Community Foundation, Oct. 3, 2002

2003

Ozark County Community Foundation, Jan 23, 2003

Bolivar Area Community Foundation, April 4, 2003
Ste. Genevieve County Community Foundation, April 4, 2003

St. James Area Community Foundation, May 13, 2003
Ripley County Community Foundation, June 26, 2003
Douglas County Community Foundation, July 3, 2003

2004

Table Rock Lake Community Foundation, March 31, 2004
Community Foundation of West Plains, Inc., March 31, 2004
Jacks Fork Community Foundation, June 23, 2004
Cassville Community Foundation, Nov. 15, 2004
Republic Community Foundation, Nov. 19, 2004

2005

Eldon Community Foundation, Feb. 23, 2005
Mountain Grove Area Community Foundation, Feb. 24, 2005
Mount Vernon Area Community Foundation, March 16, 2005
Marshfield Area Community Foundation, June 3, 2005
Community Foundation of the Hermann Area, Inc., June 6, 2005
Crawford County Foundation, Inc., July 21, 2005*
Willard Children's Charitable Foundation, Aug. 24, 2005
Joplin Regional Community Foundation, Dec. 16, 2005

2006

Houston Community Foundation, April 24, 2006

DACO Community Foundation, Aug. 15, 2006
Aurora Area Community Foundation, Sept. 11, 2006

2007

Alton Community Foundation, Aug. 17, 2007

2009

Community Foundation of the Lake, Aug. 3, 2009

2010

Meramec Regional Community Foundation, June 4, 2010

2011

Neosho Area Community Foundation, March 16, 2011
Sarcoxie Community Foundation, Sept. 7, 2011
Ozark Foothills Regional Community Foundation, Sept. 20, 2011

2014

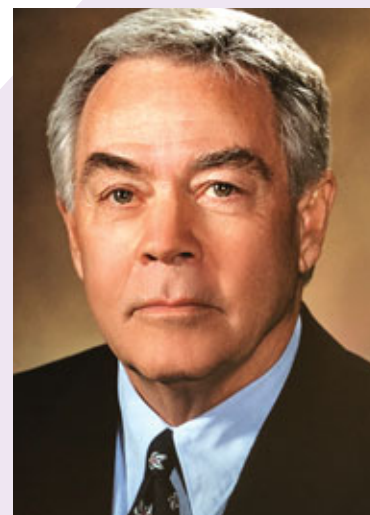
Perry County Community Foundation, Dec. 12, 2014

2015

Owensville Area Community Foundation, March 27, 2015
Cape Area Community Foundation, Aug. 26, 2015
Barton County Community Foundation, Sept. 10, 2015
Community Foundation of Rogersville, Nov. 12, 2015

**Established as independent community foundations prior to affiliating with the CFO.*

Two other affiliates were established, then merged into regional foundations: Butler County (Ozark Foothills) and Newburg (Meramec).



Harry Cooper: In Appreciation

Springfield businessman Harry Cooper's family opened the first fund ever established at the Community Foundation of the Ozarks to support downtown beautification. The Cooper family jump-started the now 49-strong affiliate network by supporting rural community endowments. They also made a generous gift to help launch the Rural Schools Partnership.

Harry passed away in April, and it is with deep appreciation for his inspired philanthropy that we express our sympathies to his family. A story written by CFO President Emeritus Dr. Gary Funk for the CFO's 40th anniversary, which you can read at medium.com/cfozarks, captures what Harry Cooper's generous spirit has meant across the Ozarks region.



CFO Affiliates to celebrate 25 years at November conference

The Community Foundation of the Ozarks' 2018 Affiliate Appreciation Conference will be held from 8:30 a.m. to 2:30 p.m. on Friday, Nov. 9, 2018 at the Christopher S. Bond Learning Center at the Darr Agricultural Center in Springfield. You may register for the conference at: cfozarks.org/affiliateconference.

To kick off the event, a come-and-go happy hour reception will be held on Thursday, November 8, 2018 at the Community Foundation of the Ozarks' Springfield office at 425 E. Trafficway from 6-7:30 p.m.

A block of rooms has been reserved at the

AFFILIATE *Appreciation* CONFERENCE 2018

University Plaza Hotel for Affiliate Foundation board members wishing to spend the night in Springfield. Reservations can be made at cfozarks.org/affiliateconference, or by calling University Plaza at (417) 864-7333 and referencing the Community Foundation of the Ozarks room block.

We are pleased to announce that Bryan Clontz will be the keynote speaker. Clontz is the

founder and president of Charitable Solutions LLC, specializing in noncash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, emergency assistance funds and life insurance appraisals/audits. We also will be awarding the fifth Affiliate of the Year awards. For more information about the Affiliate of the Year Program, including this year's groupings and a breakdown of points, go to cfozarks.org/affiliate-of-the-year.

If you have questions regarding the conference, please contact Ashley Silva at asilva@cfozarks.org.

CONTINUED FROM PAGE 10

And take off it did. The Nixa foundation today has assets of more than \$2.5 million and has distributed more than \$2.2 million back to the community in the 25 years since its inception. The second affiliate—the Lockwood Community Foundation—was established in 1998. Thanks to a strong rural effort by the CFO's second president, Dr. Gary Funk, as well as three vital challenge grants from the Harry Cooper family (see sidebar on page 11), the CFO's affiliate network today includes 49 affiliate foundations serving nearly every corner of southern Missouri, with satellite offices in West Plains and Cape Girardeau. Considering that spread, Haseltine quips:

“Dr. Funk went to a different geography class than I did—I thought the Ozarks was six or seven counties around Springfield.”

Affiliates comprise nearly a third of the CFO's asset base; the largest foundation is currently the Carthage Community Foundation at nearly \$9 million as of March 31, 2018. Ironically, the newest foundation also is the closest to Springfield, established in Rogersville in 2015.

It was one of the best moves the CFO—just starting to gain lasting traction in Springfield—could have made, both financially and for public awareness.

“We always joked the foundation was the ‘best-kept secret,’” Haseltine said. “With affiliate boards, you also get

“With affiliate boards, you also get the benefit of **500 advocates and former Board members**, an alumni base of several thousand people.”

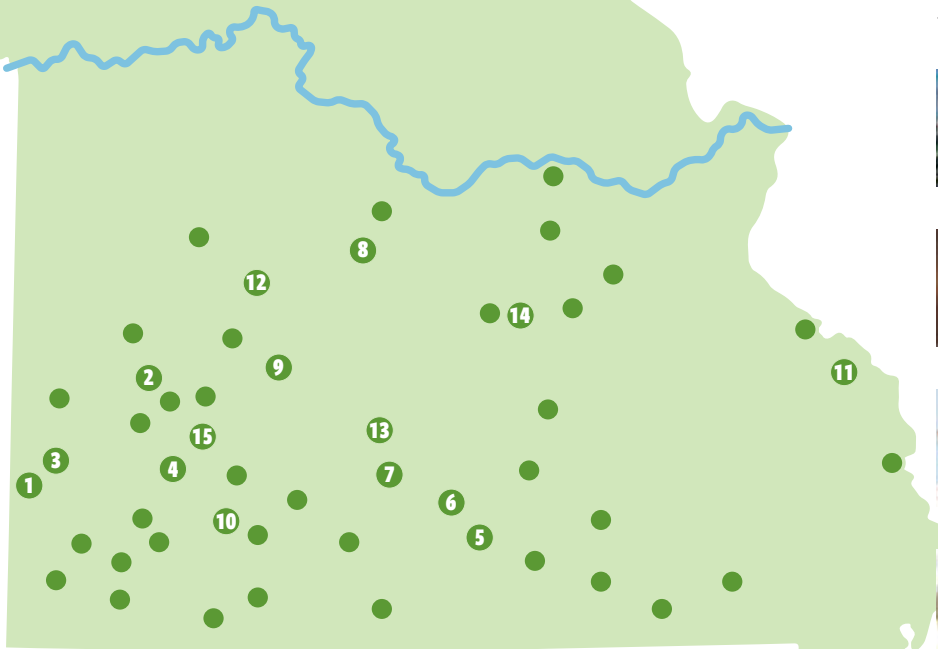
—ART HASELTINE
CFO BOARD CHAIR, 1993-94

the benefit of 500 advocates and former board members, an alumni base of several thousand people.”

“It was a massive effort that we were able to unleash,” he adds. “But who in their right mind would think it would grow to 49?”

Affiliate Updates

News from across the CFO's 49 affiliate foundations



CFO affiliates change leadership

Several CFO affiliates changed leadership between fall 2017 and the end of the 2018 fiscal year. We appreciate the efforts of these past presidents and wish the new leaders much success in building these foundations' role in community betterment.



12 Benton County Community Foundation

Outgoing: James Mahlon White

Incoming: Shannon Smith



13 Marshfield Area Community Foundation

Outgoing: Rob Foster

Incoming: Kimberly Clark



7 Greater Seymour Area Foundation

Outgoing: Charles Haywood

Incoming: Renne Wallace



14 St. James Area Community Foundation

Outgoing: Judy Cavender

Incoming: Jack Kearby



15 Willard Charitable Children's Foundation

Outgoing: Allison Greenwade

Incoming: Jacque Gray

1 The **Joplin Regional Community Foundation** has established a Philanthropic Society to help fund community grantmaking needs.

2 The **Stockton Community Foundation** hosted "Launch Stockton," to determine how to build their local economy with new market opportunities.

3 The **Carthage Community Foundation** granted \$2,500 to create three more Little Free Libraries at area schools so kids can get and read a book.

4 The **Republic Community Foundation** hosted its annual community banquet in April to celebrate Republic's outstanding volunteers; more than \$15,000 in grants were awarded to area nonprofits.

5 The **Willow Springs Community Foundation** is finishing two energy and environmentally LEED-certified homes to rent to low-middle income families for fall 2018. This will raise to 31 the total homes managed by the WSCF.

6 The **Mountain Grove Area Community Foundation** hosted a Donor Dinner on April 5. Invited were donors and prospective donors who heard from grateful grant recipients.

7 The **Greater Seymour Area Foundation** hosted a Springfield Cardinals Night on June 15, selling more than 250 tickets in a town of about 1,900. Funds raised will support GSAF's grantmaking program.

8 **Community Foundation of the Lake** hosted its 3rd annual Great Smoke Detector Giveaway to lake-area residents in July in partnership with Farmers Insurance.

9 The **Dallas County Community Foundation** started its first Giving Circle, the DIVAS. This female-focused giving circle empowers women in Dallas County to assist other women in need in their community.

10 Celebrating its 25th anniversary as the CFO's first affiliate, the **Nixa Community Foundation** made its largest grant ever last fall—\$20,000 to Least of These for a new building.

11 The **Perry County Community Foundation** in May kicked off year two of a Giving Circle group, which provided a \$10,000 grant to the Senior Center to purchase a new delivery van that will serve an additional 125 people daily.



Stretch Goals

NONPROFIT CROWDFUNDING EFFORTS LOOKING UP THANKS TO CFO'S FIRST MONTH OF MOMENTUM

The giraffe deck at Dickerson Park Zoo is one of the most popular destinations in the 100-acre park. Snack crackers, available for sale, can be fed directly to the gentle mammals, which grab the food with their long black tongues. Kids squeal with excitement

from being literally face-to-face with these tallest of land animals, of which the Dickerson Park Zoo has half a dozen or so, a sizeable group for any zoo.

But excitement for giraffes is not limited to this raised pavilion in the “Africa” section of the park. It’s palpable behind

the scenes as well, where the veterinarians and zookeepers work to keep these animals—and others across the country—healthy and free from disease and parasites. In fact, Dickerson Park Zoo is one of just five zoos in the country currently contributing to a giraffe-serum sharing program, which stores and studies blood samples from baby giraffes to use in transfusions and treat various ailments. To effectively store the serum, however, the zoo has needed a deep freezer capable of storing the biological samples indefinitely.

That’s where the CFO comes in.

To help fund the nearly \$12,000 freezer, Dickerson Park Zoo—through its nonprofit supporting agency, Friends of the Zoo—participated in the CFO’s first Month of Momentum. This 20-agency cohort which used the Cause Momentum crowdfunding platform to fundraise for specific projects during the month of

Caused Momentum

The CFO’s Month of Momentum was intended to continue the CFO’s mission of increasing online fundraising capacity and confidence among its nonprofit agency partners in lieu of the Give Ozarks day of giving, which went on hiatus for 2018. Twenty agencies were selected from among more than 30 applicants by a volunteer committee to participate in the program. In return for completing two training sessions and submitting a marketing budget, each group received a \$500 digital marketing grant to promote their projects online or via video.

The participating agencies were: CASA of Southwest Missouri; Dogwood Ranch

(Rogersville); Drew Lewis Foundation; Freedom’s Rest Family Violence Center (Ozark); Friends of Abilities First; Friends of the Zoo; Good Samaritan Boys Ranch; GYN Cancers Alliance; Include Ozarks; Isabel’s House; Downtown Joplin Alliance/Joplin Empire Market; Music Therapy of the Ozarks; Poplar Bluff Kiwanis Inc.; Sculpture Walk Springfield; Springfield Little Theatre; Springfield Victory Mission; The Summit Preparatory School of Southwest Missouri; Texas County Food Pantry (Houston); The Victim Center; and Whole Kids Outreach (Ellington).

You can see each agency’s project and results at monthofmomentum.causemomentum.org.



CFO Endowment Match Challenge

In another effort to continue the top priorities of Give Ozarks—in this case, the building of permanent endowments—the CFO in February challenged 10 nonprofits to raise \$10,000 toward a permanent endowment. In return, the CFO awarded a 1:2 match of \$5,000, resulting in (at least) \$15,000 in “forever” funds for each agency.

In all, including the CFO’s matching funds, \$224,388.14 was raised among the 10 groups, including:

- Bonebrake Museum of Nature and History, \$15,000
- Boys & Girls Club of Southwest Missouri (Joplin), \$15,000
- Boys & Girls Club of Springfield, \$15,000
- Community Counseling Center Foundation (Cape Girardeau), \$15,000
- Friends of the Garden, \$20,000
- Southwest R-V School Foundation, \$15,024.31
- Springfield Little Theatre, \$15,000
- Springfield-Greene County Library Foundation, \$79,049.98
- United Cancer Assistance Network (Poplar Bluff), \$19,474.10
- Watching Over Whiskers, \$15,839.75

“The leverage of matching gifts and the long-term benefits of endowed funds are two of the best tools for creating sustainable, stable nonprofits,” said CFO President Brian Fogle. “We’re so proud of these 10 agencies and their donors for understanding the power of both.”

CFO President Brian Fogle (left) presents a check to Libby Sanders and Dr. Mac Bonebrake with the Bonebrake Center of Nature and History.



Dr. Rodney Schenellbacher, veterinarian at Dickerson Park Zoo, says a new subzero freezer will allow the zoo to keep biological samples indefinitely, a boon for animal research, breeding and health.

April. The agencies underwent training and participated in marketing strategy sessions with Cause Momentum developer and digital marketing firm Mostly Serious. Each agency then set a goal and—with the help of a \$500 digital marketing grant from the CFO—put their plans into action during April.

Joey Powell, Public Relations and Marketing Director for Dickerson Park Zoo and Friends of the Zoo, was the engine behind the zoo effort, titled “Chilling at the Zoo,” which raised more than \$11,200 from 75 donors. At first, Powell says, she wasn’t sure how the effort would go. It quickly became apparent that the zoo’s mission—even something as behind-the-scenes as a deep freezer for biological samples—resonated with the public.

“I wish I had a video of our vet’s face when I walked in and told him we’d funded the cooler,” Powell said.

That vet, Dr. Rodney Schenellbacher, says the blood, tissue and semen samples that the zoo can now stockpile because of the freezer will contribute to research, breeding efforts and overall animal health in perpetuity, not just at Dickerson Park Zoo but across the country. At temperatures colder than 80 degrees Celsius, there’s no need to worry about samples going bad—a concern with the older freezer, which can only store samples for a month or two.

“Once we have it, we have it,” said Matt

“These donors have made a contribution to research years from now because they gave for a freezer in 2018.

They’ve helped save animals’ lives forever.

—JOEY POWELL
DICKERSON PARK ZOO

Corrie, the zookeeper in charge of taking blood samples from a number of the zoo’s giraffes.

Powell credits the Springfield community for coming together, and said the freezer couldn’t have been funded without each and every contribution.

“These donors have made a contribution to research years from now because they gave for a freezer in 2018,” Powell said. “They’ve helped save animals’ lives forever.”



DEVELOPMENT

Legacy Society

The following people have made planned giving commitments to benefit the CFO or one of its affiliate foundations from July 1, 2017 through June 15, 2018.

Springfield

Linda Ramey-Greive
William P. and Joyce A. Kastler
Ashley and Jordan Silva

Cassville Community Foundation

Donald L. and Mary B. Cupps
Douglas (Chad) Johnson
Katherine Rose

Carthage Community Foundation

Mike, Lee, and Emma Pound
Patrick and Julia Scott
Jeffrey A. Williams

Community Foundation of the Hermann Area, Inc.

Ron Kraettli

Stockton Community Foundation

Alisa Bough

Truman Lake Community Foundation

Bryan Himes

Professional Advisors Council

Welcome to the new members of the CFO's Professional Advisors Council, which provides leadership in promoting planned charitable gifts to organizations and communities in our region.

Carrie Brown, Elliott Robinson & Company, Springfield

Wayne Davis, Central Trust Company, Springfield

Michael D. Garrett, Monett

Diane Hansen, Ozarks Elder Law, Springfield

Christopher Huntley, Simmons Wealth Management, Springfield

Beth Koppang, Simmons Wealth Management, Springfield

Travis Liles, BKD Wealth Advisors, Springfield

Kirsten Morgan, Simmons Bank, Springfield

Catherine E. "Katie" Moore, Kirkland, Woods & Martinsen, Springfield

Nichole Rucker, Edward Jones, Ozark

John H. Schmidt, Schmidt Kirby & Sullivan PC, Springfield

Founders Fund — 10-Year Members

The Community Foundation of the Ozarks wants to recognize and express its appreciation to the following donors who have contributed to the Founders Fund for at least 10 years. The Founders Fund members directly support the operations of the CFO. This support helps the CFO serve donors, communities, schools and nonprofit partners across the region.

Hearld R. Ambler
Jim and Janet Anderson
Kevin Ausburn, SMC Packaging Group
Nancy Aton
Rob and Sally Baird
Dan and Zoann Beckner
Judy Beisner
Jim and Judith Billings
James and Marilyn Buchholz
Robert and Margaret Carolla
Ken and Pat Carter
Richard and Jeanne Cavender
Don and Caryl Chaney
Leon and Dot Combs
John and Mary Cooper
Louis L. and Julia Dorothy Coover Charitable Foundation

Michael M. Cunniff
Bill and Virginia Darr
Greg and Debbie DeLong
Bridget and Andy Dierks
Brian and Renee Fogle
Friends of the Zoo
Gary and Jana Funk
Gary and Karen Garwitz
Susanne and Stephen Gray
Great Southern Bank
Larry and Mary Jane Grinstead
Barbara Cook Hall
June and Sam Hamra
William R. Hardie
John and Linda Harlin
Billy and Carolyn Hixon
Jan Horton
Jerry and Linda Jared

John and Connie Johnson
Ron and Lou Thelen Kemp
Kristi and Doug Kenney
Winter and Marshall Kinne
Kelly and Louise Knauer
Julie and Bruce Leeth
Gary and Betty Lipscomb
Dr. and Mrs. Arthur Mallory
Andrew and Brianne McCormick
Mark McQueary
Karen Miller
Joan Moseley
Mark and Lori Nelson
Charlie and Mary Beth O'Reilly
Richard Owensby
Todd and Betty Parnell
Al and Phyllis Patterson
Tom and Jami Peebles
Ron and Gwen Ponds
Dr. and Mrs. B.G. Prater
Drs. Tom and Kim Prater
Chester (Ed) Pratt
Steve and Raeanne Presley
Paul and Carol Reinert

Jill and Brad Reynolds
Robert E. Roundtree
Randy Russell
Jewell Schweitzer
Dennis and Kathy Sheppard
Carol and Richard Silvey
J.C. Smith
Ted A. Smith
Lezah and Ron Stenger
Maura McCarthy Taylor and Dr. William Taylor
Ronald and Sue Carrol Terry
Doug Thornsberry
Jeanne Toombs
Jeff and Lynn Tynes
Pat Walker
Natalie Wehrman
Mr. and Mrs. Gary Wortman
Robert S. Wheeler
The Whitlock Company

Ready to Talk?

For more information on the Legacy Society, Professional Advisors Council or Founders Fund, please contact Winter Kinne, Vice President of Development, at (417) 864-6199 or wkinne@cfozarks.org.

REMEMBERING JEWELL THOMPSON SCHWEITZER

'A True Humanitarian'

AS A CHILD OF THE Great Depression, she was frugal, conservative and no-nonsense.

As a member of the Greatest Generation, she was a successful businesswoman, an active civic participant and a woman ahead of her time.

Those defining characteristics gave Jewell Thompson Schweitzer her great heart: A heart broken by the premature deaths of an infant son and her husband, Fred; a heart pulled to support causes like a renovated library for her neighborhood; a heart filled with pride each year when a fellow Ozarker was honored with the Humanitarian Award she made possible; a heart that gave out suddenly one morning in April after 97 years of living.

"She was truly just one of the most caring and giving people I've ever known in my life," says Laurie Edmondson, Jewell's goddaughter and frequent companion.

Jewell Thompson grew up near Grove, Okla., as the only girl, "The Princess" among her five brothers. Her family survived the Depression living off the food they grew on their land. Jewell's mother made her clothes, sometimes by memory of a dress they fancied during a trip to town.

She understood the value of education and went to evening classes at Drury. She worked for a judge at the Woodruff building in downtown Springfield, which had a café where she met Dr. Fred Schweitzer, whose medical practice was there. He died in 1972 of a heart ailment; years earlier, they had lost their week-old only child of a congenital heart defect.

In addition to his medical practice, Fred had extensive land and real estate holdings. At a time when women weren't always able to sign real-estate documents on their own, Jewell took over their real-estate business after he died.

She kept close tabs on the economy and the stock market. Her days were ordered by to-do lists and hard work, whether mowing lawns or maintaining meticulous ledgers and records. She never moved from the house she and Fred had built in Brentwood and she owned just two cars during her adult life.

"She really, truly came from nothing and knew what that was like," Edmondson says. "Her work ethic was very strong. She was very frugal, but also very generous with others."

Some of her generosity became obvious, like her naming gift



In December 2017, Jewell Thompson Schweitzer, left, presented the annual Humanitarian Award to Linda and Dr. David Brown for their work with the Gathering Tree and Eden Village, two efforts intended to support the chronically homeless population.

to the Brentwood Library's capital campaign. Other causes were less so. A devoted member of P.E.O., she was loyal to Cottey College founded by the sisterhood. She loved the Junior League of Springfield's Charity Horse Show and supported the American Heart Association. She also believed in the Springfield Area Chamber of Commerce and eventually came to see herself as one of the "good old boys" who could hold her own in the business community.

In the late 1980s, attorney John Courtney was assisting her with financial planning. With his passion for the CFO, hers for the Chamber and an interest in creating recognition for unsung members of the community, they worked with former CFO President Jan Horton to develop the Humanitarian Award.

"She certainly did always have the community in mind in everything she did," Horton says.

That award has now been given to 31 people over 27 years. Thanks to her generosity, her fund defrays the cost of the annual event and provides the recipient with \$5,000 to use as desired.

"She was truly one of a kind in an era when women were seen in a different way," Edmondson says. "Through the joys and sorrows of her life, she proved she was a strong, independent woman who went through a lot and pulled herself up and accomplished a great deal.

"She is a true Humanitarian."



The Big Show

CASH MOORE FOUNDATION HONORS
FIRST GRADER 'TOO BIG FOR THIS WORLD'

The laughs come as easily as the tears when his family and friends talk about him—deep belly laughs, the kind that induce the same salty tears as the ones they're wracked by, often without warning.

Cash ordering a ribeye steak for his friend, Willie (actually his friend Jon's dog). Cash negotiating with his dad for a substantial hourly pay raise for helping on the farm. Cash working the sale arena to sell giveaway promotional calendars for \$2. Cash bringing a pile of bacon to coax the company bookkeeper to watch an old western with him in the middle of the work day.

He was all of seven years old, this outsize personality, this little man, "The Big Show," as he came to be known.

"We had both prayed for a boy"

As much as they loved daughters Riley and Kyah, Bailey and Tia Moore were thrilled to have a son when Bailey "Cash" Moore was born on Oct. 24, 2010. They hoped for an heir interested in the family

business, Joplin Regional Stockyards, the largest privately owned stockyard.

What they got was a one-of-a-kind kid, a character, a mini-me of his effusive dad and then some. Cash loved farming and memorized the various pieces of farm equipment, vehicles and crops he thought he would need someday to grow cattle feed. Napping was a waste of time. In an effort to move faster, he ran around so much on his tippy toes that he ended up in leg casts for a few months because he'd shortened his Achilles tendons. He was learning auctioneering skills. He preferred working at the farm or the stockyards to school, which was too slow-paced for his liking, even though he was a whiz at math and had finally aced a spelling test the day before the accident.

He turned strangers into friends by learning everything he could through inquisitive conversations upon meeting new people.

"For being just seven years old, Cash understood life and how things worked better than most adults. He could run a dozer, ride a horse or trade you out of

your shoes if he thought you'd go for it," says his uncle, Skyler Moore. "He had a big heart and he was the littlest big man I've ever known."

"He was a giver"

On Saturday, March 3, the Moores were having people over for dinner at their home near Diamond. Cash made lemonade and popcorn. Then, he offered to take a friend on a quick ride on his Polaris Razor, a youth-sized all-terrain vehicle. Typically conscientious about wearing his seat-belt and helmet, Cash used neither for this short pre-dinner spin. He turned left too sharply and overturned in their yard, not far from Bailey, who was around the corner of the house. Rushed to a Joplin hospital, Cash underwent surgery there before being airlifted to Kansas City where his blood pressure wouldn't stabilize for another surgery. He died early the next morning.

His celebration of life filled the large College Heights Christian Church in Joplin, where he attended first grade. His family didn't want flowers, though. Just three months earlier, a week apart in December, they'd lost Bailey's mom, Kristy Moore, and his best friend, local veterinarian Harold "Doc" Haskins. They knew Cash would agree they'd seen too many funeral flowers. So, they asked for donations to the "Cash Moore Foundation."

"We knew then we wanted to do something for



Bailey and Tia Moore established the Cash Moore Foundation shortly after their son's death. Says Tia: "We'd like to continue to help people in his name."

someone else," Tia says. "He was a giver. He would want to help kids in his name."

Their advisors suggested the Community Foundation of the Ozarks. Bailey's aunt, Carthage attorney Judy Moore, is a professional advisor for the CFO's affiliate, the Carthage Community Foundation. The person he was told to contact at the CFO turned out to be a longtime Mount Vernon classmate, Winter Kinne.

The quickly opened fund gave them a charitable home for donations with breathing room to decide how to structure their giving from it. Even Bailey and Tia, knowing Cash best, were taken aback by the outpouring. They couldn't believe the gifts they were receiving, donations from throughout the stockyard's 250-mile reach and beyond, manila envelopes full of collected checks. Many came with cards and notes about encounters with Cash, from people Bailey and Tia had no idea Cash had met, much less left such an impression.

"Everybody has a Cash story," Bailey says. "They'll say: 'We don't know you very well. But we loved your son'."

"Too big for this world"

Not long after burying their son on the Moore family farm in Mount Vernon, they hit pause. Reeling from the deaths of Cash, Kristy and "Doc," Bailey, Tia and 19-year-old Riley took off in their RV and spent two weeks on the road. They needed time away from everything that reminded them every minute of their losses. They headed west and made their biggest effort each day just to pick a point on the map and get there.

"We were overwhelmed," Tia says. "We weren't ready to face everybody."

Then it was time to come home. Bailey tries to defuse the awkwardness people feel about what to say to grieving parents. He tells them he knows they loved Cash; they know he loved Cash, let's go on. They have made some grants from



"We were super blessed to have even seven years with him," Cash Moore's parents say.

the Cash Moore Foundation, mostly to help some families with kids' medical bills. A "Great Weekend of Roping" event, drawing nationally known ropers, raised more funds in June. Tia says they have a number of ideas about structuring the Foundation's giving in ways that will most appropriately honor Cash.

"Right now, we're still just trying to learn how to live day to day," Tia says. "My whole life was dedicated to taking care of him. I was his mom and did whatever he wanted."

Adds Bailey: "There's a master plan and we don't know it yet and we don't see it. But it's there."

Company bookkeeper (and surrogate mom and office counselor) Sherry Holstein is one of the people who laughs and cries about Cash at the same time, even in the same sentence. As rambunctious as he could be, she jokes that she never got onto him too hard because she assumed she'd be working for him someday.

"He was The Big Show. He was completely too big for this world," she says. "I think God knew that his time here would be short and that's why his personality was so big."

"You can't allow that personality not to go on and that's what this foundation is going to do," Holstein says. "There's no doubt in my mind that it will do huge things."

PROGRAMS

Taking the Initiative

WITH ROHI, THE CFO AND MISSOURI FOUNDATION FOR HEALTH INVEST \$750,000 IN HEALTH NEEDS OF RURAL TOWNS

Web-based mental-health access for counties without licensed behavioral health specialists. Healthier dining options and increased foot- and bicycle-friendly byways for a city of more than 14,000 people. A collaborative, 12-agency effort to curb heroin and opioid use. Empowerment and skill-development programs for teens transitioning from a childhood in foster care to life as adults.

These are just a handful of the groundbreaking efforts funded by Rural Ozarks Health Initiative (ROHI) grants, a three-year program to address priority health issues in communities or regions served by the CFO's rural affiliate foundations.

The first round of ROHI, a partnership between the CFO and Missouri Foundation for Health, will provide \$150,000 to three affiliates for three-year efforts. A local one-to-one match was required, one-half of which can include verifiable in-kind resources. The selected communities were Cassville (which led a collaborative application that included Aurora and Mountain View), Monett and Carthage.

Three Years and GRO-ing Strong

Growth in the Rural Ozarks is the CFO's other large-scale regional grant effort—this one focusing on economic development. In 2016, Marshfield, Salem and Sarcoxie were chosen as initial participants. Since then, community leaders have worked with consultant Hrishue Mahalaha of Cleveland-based Innovation Economy Partners on locally identified priorities, making gains from the structural (significant efforts toward a new I-44 overpass in Marshfield) and intangible (community-wide support for the "I Love Sarcoxie" movement). Now entering its third year, the



GRO model seeks to develop sustainable programs, including a "Business 911" help website and a web-based virtual training series, to engage other communities in the Ozarks and beyond.

To that end, in FY2018 two new communities joined a new cohort, informally dubbed GRO 2.0. Business and civic leaders, as well as the foundations from both Aurora and Buffalo/Dallas County, made significant pledges of time and resources to begin the GRO process. To provide resident feedback for the efforts in these two communities, visit cfozarks.org/GRO.



Clinton-based Truman Lake Community Foundation received \$10,000 from the second round of grants from the Rural Ozarks Health Initiative. TLCF awarded its grant to Golden Valley Memorial Healthcare to fund a crisis training program for the health system's 800-plus employees.

The Cassville Community Foundation-led proposal will address the shortage of mental health professionals in rural communities through the use of virtual technology, providing web-based assessments by trained mental health specialists to expand access and improve the quality of behavioral health care in Barry, Lawrence and Shannon counties.

The Carthage Community Foundation-led proposal will seek to lower obesity rates and redesign Carthage into a healthier city through the hiring of a Community Health Coordinator, who will seek to engage school-age children through educational programming, improve local dining and food options and increase opportunities to lead a healthy lifestyle, including improvements to civic infrastructure.

Under the Monett Area Community Foundation-led proposal, the Monett Emergency Room

Enhancement (ERE) program, with supplemental support from Clark Community Mental Health Center, would ensure coordinated care for the whole person, addressing behavioral health, physical health and basic needs. Programs and services including transportation, medication allocation

or education, social support, and counseling would be enhanced with the ultimate goal of decreasing emergency room revisits.

A second round of ROHI grants, which were awarded in March, made \$10,000 available to 10 affiliate foundations (for a total of \$100,000) to redistribute to local nonprofits to address critical health needs. (Cassville, Monett and Carthage were not eligible for this round). The same \$100,000 will be made available to 10 affiliates during both the 2019 and 2020 fiscal years, bringing MPH's total investment in the health of the rural Ozarks to \$750,000 over three years.

Impact was a watchword of the volunteer committees, which chose both the first and second rounds of ROHI grant recipients. For example, the Truman Lake Community Foundation, the Clinton-based affiliate serving Henry County, awarded its \$10,000 grant to Golden Valley Memorial Healthcare. In turn, GVMH plans to fund a Crisis Training Program for the regional facility's 800-plus employees, improving the preparedness and capability of both medical and non-medical staff.

Other recipients of the \$10,000 ROHI grants included the Bolivar area, Cape Girardeau area, Crawford County, El Dorado Springs/Stockton, Mountain Grove area, Perry County, Republic, Ripley County and Table Rock Lake area (Stone County).



RURAL OZARKS
Health Initiative

Coover reaches \$5 million milestone

The staggering impact of Julia Dorothy Coover's tribute to her husband and commitment to community

Blink and you might miss Hudson, Mo. The tiny Ozarks township, located in Bates County, is anchored by a school of 42 students, who eventually wind up in nearby Appleton City for later grades. Last year the school's playground equipment—original to the structure, which was built in 1952—was deemed unsafe.

The parents and residents of Hudson rallied and began a push to replace the old sets with brand-new, accessible equipment to give the school's children a new place to play for the first time in 66 years. The final piece of that funding was a \$15,000 Coover Regional grant, which representatives of Hudson's Parents and Teachers Organization accepted at the annual Coover grant celebration in April, one of 21 awarded to organizations focused on serving rural areas across central and southern Missouri. And this result—improving life in a small township light on resources but strong in motivation—is indicative of the Coover program. The fund has awarded hundreds of such grants that, collectively, surpassed the \$5 million milestone this year since its first awards in 2002.

This year's Coover Regional Grant recipients were selected from among 101 proposals that totaled \$1.2 million in requested funding. Coover regional grants go to agencies working on poverty, health, education, community development and arts issues. Representatives of the agencies receiving the grants made comments about the needs they are addressing in their communities.

These grants are made possible through the generosity of the late Julia Dorothy Coover, who worked for



Julia Dorothy Coover established the Coover Charitable Foundation in 1992.

Commerce Bank for 30 years. She established the Louis L. and Julia Dorothy Coover Charitable Foundation in 1992 to honor her husband's memory.

"It is our sincere pleasure to have helped the Coover fund give back to the community in excess of \$5 million with this year's round of distributions," said Commerce Trust Vice President Jill Reynolds, a former CFO board chair and longtime Coover collaborator with the CFO.

"We are elated to continue to assist these organizations that are all working so hard to benefit our communities in southern Missouri. Mrs. Coover would be so proud to see the impact she and her husband have made through their generous legacy."



Attendees at the 2018 Coover Regional Grant awards gather to share their projects and celebrate the \$5,392,645.63 in distributions made by the Coover Charitable Foundation since 2002.

2018 Coover Regional Grant Recipients

- About Our Kids:** \$19,000 to support the purchase and installation of a ventilation hood in the main kitchen of the facility and to replace aging kitchen equipment and appliances;
- Boys & Girls Club of the Ozarks:** \$15,495 to support the Summer Program Scholarship Fund for needy families in Stone and Taney County;
- Care to Learn:** \$19,000 support the Care to Learn Clothing Closet concept in the rural school districts of Ava, Greenfield, Marionville, and Monett;
- CASA of South Central Missouri:** \$16,100 to support the purchase of e-tablets for CASA volunteers;
- DOCO Inc., Sheltered Workshop:** \$19,000 to support the implementation of handicap accessibility in the Ava-based sheltered workshop for its disabled employees;
- Eastern Jasper County Laubach Literacy Action/ Carthage Family Literacy Council:** \$15,000 to support an early literacy program, which counsels new parents on the benefits of reading to their child beginning at birth;

CONTINUED ON PAGE 22

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Hudson School District/Hudson PTO:

\$15,000 to support the purchase and installation of a new playground for the school and community;

Lake Area Big Brothers Big Sisters:

\$9,750 to support the organization's school based mentoring program;

Oregon County Long Term Recovery

Committee: \$11,355 to support the work of the committee in its long-term efforts to return Thomasville and Oregon County residents to their homes after historic flooding in 2017;

Ozark Greenways:

\$19,000 to stabilize the Coates Branch stream bank and to continue the work of the Rail Trail Preservation Project;

Ozark Trails Council Inc.:

\$15,325 to create a more welcoming, comfortable space for campers of all abilities and their families by providing a handicap accessible space;

Polk County Health Center:

\$19,000 to build a coordinated, community-wide effort to address issues related to opioid abuse and misuse in Polk County through prevention, intervention, and treatment;



Ripley County Caring Community

Partnership: \$8,365 to support programming, which assists individuals in preparing to take the High School Equivalency Test (HiSET) and to attend online college courses;

St. James Caring Center:

\$19,000 to improve and increase frozen and shelf-stable food storage at their new senior center and food pantry facility;

The Community Partnership (Rolla):

\$10,310 for the Early Care and Education program, providing CPR and first aid certification classes, cots and cribs, first-aid kits, and other safety items for early childhood centers;

Whole Kids Outreach:

\$15,000 to

support a nurse, which will provide approximately 350 home visits to 75 families with at-risk newborns living in six impoverished counties in south-west/south central Missouri;

Youth Volunteer Corps:

\$4,300 to launch the YVC-Joplin, which will plan, lead, and execute four weeks of community service projects in Joplin.

The grants are selected by a volunteer board committee representing regional communities, chaired by Jill Reynolds. Other members included: Rob Foster, Marshfield; Brian Hammons, Stockton; Jim Holt, Reeds Spring; Randy Howard, Aurora; Kathy Lasley, Cuba; Robin Morgan, West Plains; and Marvin Silliman, Lake Ozark.

Representatives of 19 organizations received a total of nearly \$250,000 in the distribution of the Coover Regional Grants in 2018.

New grant programs open

The CFO opened its 2018-19 grantmaking program in early July, corresponding with the new fiscal year. Two new grant rounds will take place in the coming year. One will focus on diversity and inclusion proposals with a total of \$60,000 available. The second will focus on health-related proposals for Greene County senior citizens with \$40,000 available. This will be in addition to an ongoing partnership with the Greene County Senior Services' Fund.

Overall, the CFO will have more than \$1.5 million for FY19 discretionary grant-making. This includes several partnerships with external funders, which have made grants to the CFO to re-grant for specific issues such as rural health care. For more information on CFO grant opportunities, visit cfozarks.org/grants.

Coover Place-Based Education Grant Recipients

The Coover Place-Based Education Grants, totaling about \$71,000, were awarded to recipients at the April 6 Rural Schools Rendezvous, held in Willow Springs.

These awardees included:

Placeworks Art Initiative: \$50,000 to fund the 2018-19 operations of the region-wide program, facilitated by the Springfield Art Museum, which sends trained teaching artists into rural Missouri classrooms to create custom, interdisciplinary art lessons, free of charge to districts and teachers. Field trips to the Springfield Art Museum and Watershed Committee of the Ozarks' Watershed Center are incorporated into the projects. Teachers are selected based on an application process.

Ozark Mountain Music: \$10,000 to expand both after school and camping programs in

order to teach traditional Ozark fiddle music to more young students.

Missouri State University AHEC: \$10,000 to support the Bolivar Pipeline Education and Recruitment Program and to expand the program to six additional counties with workshops in 21 high schools, summer MASH camps, and the Bolivar ACES club.

Sweeney Elementary School in Republic: \$1,000 to expand the operations of the Sweeney Elementary student garden club and begin a sharing program through food pantries at Sweeney Elementary and in the Republic community.

The Coover Place-Based Education Grants are selected by a volunteer board chaired by Jill Reynolds. Other members included Judy Brunner, Matt Hudson and Heather Landwer.



Strengthening Rural School Connections

More than 30 educators from across the Ozarks and Illinois gathered for the annual Rural Schools Rendezvous, held April 6 in Willow Springs. In addition to the presentation of the Coover Foundation's place-based education grants (see previous page), Leslie Cook, senior director of educator development at the Teton Science Schools' Teacher Learning Center in Jackson, Wyo., led a workshop exploring ways to connect students to place through discovery-based education.

The 2018 Ozarks Teacher Corps cohort also was introduced. This year's class of future rural educators consists of (left to right, below): Joaly Ray, Forsyth; Austin Jackson, Strafford; Lexie Waggoner, West Plains; Jacob Small, California; Kelsi Adey, Houston; Loni Johnson, Crane; Aspen Wilkins, Seymour; Annie LaFollette, Strafford; and Kaylee Terry, Seymour.



Leslie Cook from Teton Science Schools lead the featured workshop for the 2018 Rural School Rendezvous.



New Murals Revealed

Placeworks Arts Outreach unveiled several new permanent installations in area schools this spring, including Highlandville Elementary (above) and Willard Middle School (below). Teaching artists Cory Leick and Lillian Fitzpatrick lead the creation of both of the works, helping hundreds of students leave a permanent mark on their schools.

Highlandville students learned about fossils found in the region, then formed their own out of found objects. These new "fossils" were pieced together into a large mosaic that now hangs on the exterior of the elementary building for the whole community to see.

In Willard, students produced an "agamograph" that combined two separate images into one large mural. From one angle, a white tiger—the school's mascot—leaps across the wall; from the other, "Carpe Diem" stands out in rainbow colors, surrounded by inspirational messages and quotes selected by students.



A Final Word

A NOTE FROM CFO PRESIDENT BRIAN FOGLE



AS WE WRAP UP THE END of our 45th year of existence, there is much to reflect on. This has been a very interesting year. As part of our long-range planning efforts, we brought in experts in our field to take a look at us and share with us ways we can improve.

I have likened this process to physical therapy. You pay someone to hurt you so you can get stronger. As part of the process, we went through an activity-based cost analysis to give us a better idea of the products and services that provide us a surplus, and the ones that we invest in. Our board committed to this not because anything was wrong, but because things were going right. As Jim Collins said, “Good is the enemy of great,” and our board and staff want to continually strive to be better.

This newfound enlightenment has resulted in some significant changes both internally and externally. We continually need to balance mission with margin. We must have the financial resources to be sustainable over time, while never losing focus on our mission to improve the quality of life in our region. Both are absolutely critical for our success.

Some of you know that I’m a “recovering banker.” I spent nearly three decades in the world of capital and capitalism before coming over to the non-profit world about a decade ago. While I was in the private sector, I often heard the term “they need to run that charity more like a business.” Yes, the nonprofit world certainly can learn from the best practices of the business world. That is why it is so important to have an engaged and diverse board with different perspectives to help bring all points of view. Our own organization is so fortunate to have a board like that. But now, with experience on the other side, I’ve realized that the business world also can learn from the best practices of the nonprofit world. I’m amazed

We now have made **more than \$350 million in grants and distributions since 1973**. The banker in me is impressed by that number, but the charitable voice in me reminds me **what a difference each and every dollar has meant** to this part of Missouri we all call home.

every day by the passion and commitment to mission from my own co-workers, as well as the staffs of about 650 nonprofits we work with who do so much with so little. They don’t see the barriers, they see the opportunities to help, and help they do.

Maybe the intersection and alignment of perspectives comes together best with our donors, many of whom have accumulated wealth and resources from the business world, and transfer that to passion and mission through their generosity. When we all care and learn together, magic happens.

After 45 years, the CFO has been helping donors and charities align interests for a long time. In fact, we now have made more than \$350 million in grants and distributions since 1973. The banker in me is impressed by that number, but the charitable voice in me reminds me what a difference each and every dollar has meant to this part of Missouri we all call home.

We stand ready to help you. We’ve done it for 45 years, and look forward to the next 45.

THANK YOU!

The CFO expresses its appreciation to these financial professionals, who referred clients to the CFO over the past year to help them fulfill their charitable goals. The CFO works closely with professional advisors to complement their financial expertise with our knowledge of charitable giving, regional needs and nonprofits. Together, our services create easy and engaging ways for donors to connect their passions to purpose.



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CLAYTON CAMPBELL
SPENCER FANE, SPRINGFIELD

JAMIE CLARK
CENTRAL BANK, MARSHFIELD

GRETCHEN CLIBURN
BKD WEALTH ADVISORS, SPRINGFIELD

TRENNY GARRETT
CENTRAL TRUST COMPANY,
LAKE OF THE OZARKS

NORMAN GLAUS
GLAUS & ASSOCIATES, CAPE GIRARDEAU

MIKE GRAY
BKD, JOPLIN

MITCH HOLMES
EDWARD JONES, BRANSON

STAN IRWIN
EDWARD JONES, CAPE GIRARDEAU

CAMERON JONES
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STACEY PENNEY
PENNEY, MURRAY & ASSOCIATES, SPRINGFIELD

DAN STANLEY
EDWARD JONES, JOPLIN

RYAN STANLEY
EDWARD JONES, JOPLIN

RANDELL WALLACE
LATHROP & GAGE, SPRINGFIELD



*The Outback Corral petting zoo has long been a popular place to make new friends at Dickerson Park Zoo. The first grant awarded in the CFO's 45-year history helped establish the original petting zoo. Read about the celebration of the CFO's 45th anniversary on **page 6**, and about the latest grant benefitting the zoo on **page 14**.*

