

PASSION & PURPOSE

THE CFO MAGAZINE  SUMMER 2019



Legacy Builders

Next generation of Meek family follows parents' lead.

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iHola, SGF!

New grants promote diverse cultures.

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Aurora on the RISE

Springfield anti-poverty program reaches out to the region. PAGE 6



Our Mission & Vision

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

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A complete set of tools

Through the Agency Partner Program, organizations like Connect2Culture are building more than capacity funds



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A FINAL WORD

Letter from the Chair

A NOTE FROM OUTGOING BOARD CHAIR ROBIN WALKER

With the CFO's 45th anniversary in our rear-view mirror, our board and staff headed right down the road toward a new strategic plan to take us up to our 50th year.

We believe a good strategic plan will help us set achievable goals that will put the CFO in a great position as it hits middle age in 2023. At its core are our mission and vision statements, which you can read on the inside front cover, along with our desire to stay nimble and flexible enough to meet challenges that may not even be on our radar today.

Keeping those values in mind, we also don't want to operate in a vacuum. So, we invited a group of community members to participate on a strategic planning committee. Many were familiar with our work; some not as much. They represented both Springfield and our regional service area. At the same time, we also conducted an awareness survey among our donors and professional advisors with the public invited to weigh in. The sum total of that input creates a better plan than we would have had otherwise.

The committee presented its recommendations to the Board of Directors, which approved the plan in June. Here are the three overarching goals.



On behalf of our board, I would like to thank the members of the strategic planning committee for their participation, their insights and their thoughtfulness. Board Secretary Morey Mechlin chaired the group; the members included myself; Jim Anderson, Community and Public Affairs at CoxHealth and former President of the Springfield Area Chamber of Commerce; Julie Turner Brown, attorney with Carnahan, Evans, Cantwell & Brown and former CFO Board Chair; Greg Burris, Executive Director of Give 5; Richard Cavender, retired Executive Director of the Meramec Regional Planning Commission and former CFO Board Chair; Sherry Cook, Marketing Professor at Missouri State University; Rob Foster, a Marshfield-based contractor and former CFO and Marshfield Area Community Foundation Board Chairs; Gloria Galanes, retired MSU Dean of the College of Arts & Letters and former CFO Board Chair; Debra Shantz Hart, a Springfield attorney, CFO board member and Housing Plus affordable housing developer; Bonnie Keller, President and CEO of Ronald McDonald House Charities of the Ozarks; Stephanie Stenger Montgomery, Springfield attorney and former CFO Board Chair; Marty Moore, former Executive Director of Learning Support & Partnerships at Springfield Public Schools; Nick Nelson, Director of the Springfield Art Museum; Francine Pratt, Executive Director of Prosper Springfield; Jeff Schrag, owner of The Daily Events and Mother's Brewing Co. and former CFO Board Chair; and Tim Stack, Executive Vice President of SRC Holdings Corp.

► **Raise community awareness and clearly articulate the CFO's value proposition to each constituency in order to position the CFO as *THE* trusted place for philanthropic giving and leadership.**

The planning committee and board feel strongly that the CFO should be the leader for our region by increasing the number of philanthropic funds and donors, researching how to best serve our nonprofit partners, focusing on "next-gen" donors to carry on this 45-year legacy, and providing space for groups to meet and gather face to face to tackle our challenges.

► **Target strategic opportunities to increase the number of affiliate foundations and potentially expand the CFO's current service region.**

While the CFO currently serves a large area of central and southern Missouri through its 49 affiliate foundations, there are still pockets that we believe would greatly benefit from this work, including the Bootheel and the southwest corner of the state.

► **Maximize the impact of the CFO's grantmaking on focused areas of need by creating fewer, but larger, programs and initiatives.**

The direction among many grantmakers, public and private, is to focus more intently in areas where they can make the most impact, whether that's a specific project, core value or community challenge. The CFO already has moved in this direction with large-scale efforts like the Northwest Project in Springfield and Growth in the Rural Ozarks in five regional communities.

A handwritten signature in dark ink that reads "D. Walker". The signature is fluid and cursive.

—Robin Walker

FY20 CHAIR EMERITUS

Changing of the Guard

THE CFO EXPRESSES ITS APPRECIATION for the many years of service contributed by the volunteer leaders who completed their board terms in June. A 21-member volunteer Board of Directors governs the foundation; generally 10 members represent the Springfield area and 11 are drawn from communities supported by affiliate foundations. The CFO also seeks board members from a variety of professional skills and backgrounds to share their expertise.

Randy Howard, of Aurora, served six years on the board, including the Executive Committee. He has chaired the Investment Advisory Board for the past two years. He also has served as the founding president for the Aurora Area Community Foundation. He is a retired financial advisor with Edward Jones in Aurora. Randy and his wife, Melissa, have a Family and Community Fund.



Kathy Lasley, of Cuba, completed a term of board service, including the Coover Grants and Regional committees. She serves as president of the Crawford County Foundation and Impact 100 Crawford County. She is a retired educator and active volunteer in her community.



Jared Lightle, who has represented the Carthage and Joplin areas, also is completing his sixth year of service. He first became associated with the CFO following the 2011 Joplin tornado when his former company, Leggett & Platt, opened a benevolence fund to support employees affected by the historic storm. He also has served on the Regional Committee.



Ron Penney, of Springfield, has served six years as a Director, including as both Treasurer and Secretary, and on the Acceptance/Legal Committee. He is a wealth advisor in his firm, Penney, Murray & Associates, a practice of Ameriprise Financial Services. He has referred a number of clients to the CFO to help them meet their charitable goals. Penney and his wife, Janice, established a Family Fund.



Gary Powell, a Springfield attorney, has completed six years of service. He also chaired

the board's Development Committee. He is a partner in Spencer Fane's Springfield office and practices in the Estate Planning, Trusts and Estate Group. He has made many referrals for clients interested in including charitable giving in their estate planning.



New Board Members

Four new members joined the Board of Directors for terms beginning July 1.

Laurie Edmondson, Ed.D., is the Director of Elementary Education at Drury University as well as a professor of education. She also worked for Springfield Public Schools in reading and literacy. She is the goddaughter of the late Jewell Thompson Schweitzer, who founded the Humanitarian Award.

Jeff Layman is Partner, Principal and Chief Investment Officer for BKD Wealth Advisors, LLC. In his role, he oversees investment strategy and more than \$1 billion in assets for BKD Wealth Advisors. As Chair of the Investment Advisory Board for FY20, he also will be a member of the CFO's Executive Committee.

Dean Thompson, of Republic, is the Associate General Manager for Economic Development and SpringNet at Springfield City Utilities. He previously served as the Republic City Administrator and was a founding member of the Republic Community Foundation. He is a Commander in the U.S. Army Reserve. He and his wife, Robin, established Family and Community funds with their children.

Bryan Vowels also serves on the Joplin Regional Community Foundation board. He was instrumental in developing the JRCP's Philanthropic Society, known as "The Phil," a giving circle focused on emerging community needs through high-impact grantmaking. He is the Managing Director of Vowels & Stovern Wealth Management Group of Wells Fargo Advisors in Joplin.

Executive Committee

The following members will serve as officers on the FY20 Executive Committee:

- **Abram McGull II**, Chair; Assistant U.S. Attorney in the U.S. Attorney's Springfield office
- **Rhonda Christopher**, Vice Chair; BKD Wealth Advisors, Springfield
- **Jim Holt**, Treasurer; Retired Reeds Spring educator and Secretary of the Table Rock Lake Community Foundation

- **Morey Mechlin**, Secretary; Springfield civic volunteer and retired Executive Director for Care to Learn
- **Debbie Shantz Hart**, At-large; Springfield, co-founder of Housing Plus affordable housing development company
- **Robin Morgan**, At-large; President of the Community Foundation of West Plains Inc., and advisor at Valic Financial Advisors
- **Robin Walker**, Chair Emeritus; Monett Area Community Foundation Board of Directors and CEO of Walker Asset Management, LLC
- **Jeff Layman**, Investment Advisory Board Chair; Chief Investment Officer for BKD Wealth Advisors LLC, in Springfield

CFO Staff Updates

The CFO has welcomed three new employees in recent months, and said goodbye to several as well.

Jennifer Smith joined the CFO as Accounting Assistant in May. She previously worked at Chase, Jack Henry & Associates and Community Financial Credit Union in banking, technical and customer support roles. She received a degree from Springfield College.



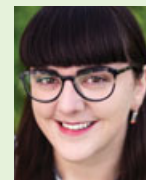
She replaced Kimberly Gimlin, who left to join Expedia Group in Springfield.

Lisa DeSha joined the CFO in early June as Controller. Her family relocated to Springfield from Jefferson City where she served as Controller and Chief Financial Officer for Special Olympics of Missouri since 2011. She has an accounting degree and MBA from Lincoln University in Jefferson City.



Lisa is replacing Kate Starkey, who is getting married and moving to the Lake of the Ozarks area.

In mid-June, **Ellen Neville-Verdugo** joined the staff as the Program Coordinator. She previously worked at the Springfield-Greene County Library and Moxie Cinema. She received a bachelor's degree in fine arts from Drury University and the Art Institute of Chicago.



Ellen replaced Kaleigh Trammell who re-located to Iowa for family reasons.

Making the most of Donor Advised Funds

Donor advised funds have been in the news in recent months amid efforts in some quarters to change regulations governing these funds. Some believe donors should be required to spend down some portion of their DAFs or not accumulate for more than a certain period of time.

The CFO doesn't experience the types of issues often referenced in these discussions. To the contrary, donor advised funds provide a flexible, intentional approach to charitable giving.

So, what is a donor advised fund? It's a charitable fund held and owned by a 501(c)3 sponsoring organization that allows donors or the donors' representatives to retain advisory privileges over charitable grants and distributions from the fund.

The CFO's attorney Doug Nickell, with Carnahan, Evans, Cantwell & Brown PC, explains more:

"Clients motivated to make charitable donations for year-end or other tax planning purposes may not be comfortable naming a specific charity within the tax deadline. DAFs give clients the flexibility to time their charitable donations and the attendant tax benefit to fit their tax situation at the time—and then to make decisions on whom they intend to ultimately benefit from the donations without being pressured for time," Nickell says.

"DAFs give clients the ongoing flexibility to make grant recommendations while at the



same time having access to CFO's diversified investment portfolio, all without the expense and administrative hassle of a private foundation.

"DAFs also allow clients to involve multiple generations in making grant recommendations by naming children, grandchildren and even future descendants as donor advisors, weaving continuity of giving into the fabric of the family," he says.

The CFO's FY20 Board Chair Emeritus Robin Walker, managing partner with Walker Asset Management, says DAFs have several advantages over writing a check to a specific charity.

"Service, flexibility and tax benefits," Walker says. "You, as the fund's advisor, suggest the charity you'd like to support and the CFO takes it from there. The CFO handles the back-office

administration while ensuring the grant is doing good. The CFO can be as much or as little help as donors would like."

Gretchen Cliburn, Director of BKD Wealth Advisors and member of the CFO's Professional Advisors Council, offers a strategic approach to make the most of a charitable gift, which is not exclusive to cash.

"DAFs have simplified my client's giving to qualified charities while still providing tax efficiency," Cliburn says. "DAFs have made it easy to use appreciated stock or mutual funds to make the contribution and then have the ability to make grants one time or periodically to one or multiple charities.

"With the recent tax law changes, we are now using DAFs to bunch several years of contributions into one year for tax purposes, yet provide the distributions over time to charities."

FAQs for DAFs

Do DAFs have a minimum amount they must grant?

No. Unlike private foundations, DAFs do not have a minimum annual amount that must be granted. The maximum amount that could be granted each year depends on how the DAF was established.

If I establish a DAF, what happens when I am no longer here? Will the fund continue to grant?

As the fund's establisher, you have several options for succession of the fund:

- Name successor advisors like your children, grandchildren, nieces/nephews or friends.

- Request the fund annually support specific nonprofits or a specific nonprofit purpose of your choosing.
- Request the fund annually support an area of interest but not name a specific nonprofit, i.e. the arts.
- Request the fund annually support the area of greatest need in your local area.

Do grants from DAFs have to stay in CFO's service area or even Missouri?

No, DAFs with the CFO may grant to any 501(c)3 nonprofit, house of worship, school district or municipality in the United States.

Can I be anonymous with a DAF?

Absolutely! You choose the name of the DAF when it is established so it can bear the establisher's name or not. Also, you can tell CFO staff if there is a specific grant/organization where you would like to remain anonymous. Flexibility and service are the hallmarks of DAFs.

For more information about donor advised funds, contact Winter Kinne at (417) 864-6199 or wkinne@cfozarks.org.

Community Foundations 101

A COMMUNITY FOUNDATION IS AN independent registered charitable institution generally serving a geographically defined territory with the goal of improving the quality of life for its citizens by maintaining, investing and administering a pool of funds contributed by multiple donors. Its roles include building funds and endowments; grantmaking to support community needs and aspirations; and providing leadership to convene and reflect their citizens.

“Community foundations serve as **moderating institutions.**”

—DAVID BROOKS, THE NEW YORK TIMES

“The raising of extraordinarily large sums of money, given voluntarily and freely by millions of our fellow Americans, is **a unique American tradition** ... Philanthropy, charity, giving voluntarily and freely ... call it what you like, but it is truly a jewel of an American tradition.”

—PRESIDENT JOHN F. KENNEDY

SOURCES: NATIONAL PHILANTHROPIC TRUST; THE FOUNDATION CENTER; COMMUNITY FOUNDATION RESEARCH AND TRAINING INSTITUTE

1914 Year that the Cleveland Foundation, the first community foundation, was established. Founder Frederick Goff sought a better method for passing money from one generation to the next through a pool of funds to meet ever-changing community needs.

866 Approximate community foundations in the United States

\$91B Assets of community foundations, as of 2017

\$6.76B Contributions to donor-advised funds at community foundations in 2017

\$5.78B Grants from donor-advised funds at community foundations in 2017

Donors enjoy camaraderie and catching up

The annual June donor appreciation dinner is an opportunity to thank those who support charitable giving through the CFO, including new fund holders, Legacy Society members and Professional Advisors.

It's a chance to catch up with old friends before a final word from incoming Board Chair Abram McGull II, below right.



This year's event, held at Mother's Brewing Company's Backyard, was a classic summer picnic, complete with delicious food from Hog Tide Bar-B-Que and Prairie Pie, great tunes from Molly Healey and Dallas Jones, and plenty of gingham in CFO green.





Hope Builds in Aurora

IN ITS THIRD YEAR, THE NORTHWEST PROJECT'S POVERTY-ALLEVIATION STRATEGIES EXPAND TO RURAL COMMUNITIES

▲ *Brandy Coulter and three of her children—Hailie, Oscar and Phoebe—help build a community garden for use by cohort members of Aurora Project RISE.*

Alongside the United Methodist Church in Aurora, between a row of blackberry bushes and a stand of pear trees, a community garden is taking shape. Volunteers and cohort members of Aurora Project RISE, a new rural extension of the Northwest Project, work together to expedite the labor of laying weed barrier and connecting drip irrigation lines.

Aided by the eager hands of several children, Brandy Coulter hefts cinderblocks into place.

“In our plot, we’ll have tomatoes, cucumbers, corn, green beans—we’re really excited,” says the mother of nine. “It’s the first time for my kids to learn how to garden.”

Here, sharing laughs with fellow community members and teaching skills to her children, Brandy is clearly in her element. Two years ago, those values of family and community seemed at odds with each other.

She and her husband had good jobs that supported their large family in Washington,

Mo., on the outskirts of St. Louis. But four hours away, in rural Lawrence County, her mother needed help.

“She had some health issues, and I wanted my kids to see their grandma more often,” she said.

The move meant leaving behind more than just jobs, friends and the conveniences of living near a large city.

“I was very active in the community,” she said. “I knew all of my kids’ teachers, I knew who to talk to if something came up. It was tough leaving that part behind.”

How a project rises

When the Northwest Project began in 2016, “replicability and scalability” were ultimate goals of the five-year program to develop strategies for poverty alleviation. Centered at The Fairbanks community center in the Grant Beach neighborhood, the NWP’s presence



The Northwest Project: Year Three

The Northwest Project, a collaborative effort to pilot strategies for helping families overcome poverty, showed continued progress in Year 3, which ended in March. In Springfield, cohorts were added in the West Central neighborhood and at L&W Industries, marking the first time an employer has provided NWP programming for its employees. Through the first three years of the NWP, 81 individuals in 11 cohorts were served, impacting an estimated 292 lives.

The project also expanded to the rural Ozarks through Project RISE (see main story), with cohorts in Salem and Aurora. In the two cohorts, 18 individuals were served, affecting an estimated 57 lives—bringing the total number of people impacted by NWP programming to 349.

The expansion to rural communities also signals a shift in the curriculum used by the project. RISE—Reaching Independence through Support and Education—was developed by Amy Blansit and NWP staff, replacing Circles USA. The name will also be used for all future communities. Project RISE cohorts are assembling in Marshfield and El Dorado Springs, and similar programs are being offered in Buffalo and Joplin.

Other highlights for Year 3:

- Ongoing research, conducted by Missouri State University, shows **household income increased by 32 percent**, or \$505.50 per month, for participants in cohorts 1–9.



- A survey of cohort members revealed that **two-thirds of respondents moved to Springfield from rural areas**, possibly in search of education and employment opportunities.
- A grant from Ozarks Health Advocacy Foundation provided **on-site mental health resources at The Fairbanks** for 15 cohort members. NWP participants have incidences of “adverse childhood experiences” that are nearly 25 percent higher than the national average, which can lead to lifelong mental and physical health challenges.
- Springfield Metropolitan Bar Association provided **462 hours in legal services and education** to cohort members, a value of \$51,500.
- In the three years of the program, **more than 90 organizations have contributed goods or services** to project activities like weekly meals and home repairs with an estimated value of more than \$600,000.

Read the full Year 3 report at cfozarks.org/northwest.

in Springfield has grown organically to other neighborhoods in Zone 1, with cohorts in the Robberson, Woodland Heights and Heart of the Westside neighborhoods.

But in year three, the project’s programming took the leap into two rural communities, testing its “replicability and scalability” much earlier than expected. Prompted by conversations shared in communities participating in the CFO’s Growth in the Rural Ozarks economic-development program, two “Project RISE” offshoots of the Northwest Project were established in Salem and Aurora. Salem was one of the three communities to participate in GRO’s original form, while Aurora was part of a smaller-scale second round, all facilitated by Hrishue Mahalaha of Cleveland-based Innovation Economy Partners.

“At one of the early GRO meetings for Aurora, Hrishue talked about, in hindsight for first GRO communities, that they should have addressed poverty earlier in the program,” says Marsha Egan, Project Director for Aurora Project RISE. “We took it as a sign.”

With their community focused on GRO,

Egan and others were concerned there wouldn’t be enough resources to launch a program similar to NWP in Aurora. Of course, in a small town, word travels fast. Nicki Gamet, a hospital administrator with Mercy’s clinic in Aurora, heard about the program and worked with the health system to find funding for the program.

Using new curriculum developed by lead grant recipient Amy Blansit, the group in Aurora formed a committee with Egan, Aurora junior high principal Brad Boettler and five others and came up with a new tagline: “Reaching Independence through Support and Education,” or RISE for short. The name stuck and is now used for the curriculum used by all NWP cohorts.

Last summer, Egan and her fellow committee members planned their first informational meeting. They circulated flyers, a few radio spots, Facebook posts and plenty of word of

mouth, but weren’t sure what kind of turnout to expect.

“We’d never done anything like that before, so we set up a free dinner at the old Armory. If we had 10 show up, we’d be beside ourselves. We had 42 people!”

Brandy Coulter was one of them.

“More than anything, it sounded hopeful,” Brandy says. “They emphasized connecting to the community, that the bank here in town is going to care a lot more than a national chain.” After that initial meeting, she joined the inaugural cohort for Aurora Project RISE, which recently finished its first phase.

“We were supposed to have five families—we ended up with 10,” says Egan. “I couldn’t say no to the people who met the requirements and needed the help.”

Seven individuals in six households

“This is amazing.
It’s giving people hope.
It’s giving people a way out.”

—MARSHA EGAN,
AURORA
PROJECT RISE

CONTINUED ON PAGE 8

completed the initial cohort, representing 33 lives affected by Project RISE. In turn, the program brought together the wider community.

Lowering debt reduces stress

Five days a week, Brandy makes the two-hour round trip to Silver Dollar City where she serves as a manager for the Hospitality House, the main gift shop at the entrance of the park.

“This season, I received a promotion. It’s an awesome place to work. There’s a doctor on site that we can see for \$25. They have other attractions where our whole family can get in for free. I mean, it costs \$100 to go to the movies, so being able to take my entire family into an attraction for free is a huge benefit.”

Her husband has also worked his way up at Damar Worldwide, a large employer in Aurora, and now has his own delivery route for the lightbulb supplier. And with the lessons learned from Project RISE, the Coulters’ financial situation is quickly improving.

“We found that the participants have much greater success if you can build a strong foundation with their finances,” says Egan, noting that many participants struggle with debt and high-interest loans. To complicate matters, as a rural community, Aurora has limited options



▲ Quincy London, right, shows Brandy Coulter, Marsha Youngblood and Chrissy Forrester how to install a drip irrigation system at the Aurora Project RISE community garden at Aurora United Methodist Church.

for financial services.

“In Aurora, we don’t have a credit union,” which would be more amenable to making loans to assist participants. “I thought that if we had a collateral pool, maybe the banks will loan to us.” With grantwriting help from Theresa Pettit, the group received \$4,000 from the Aurora Area Community Foundation and \$20,000 from the Coover Charitable Foundation. They then worked with First Independent Bank to assist participants.

First Independent is one of several local businesses, including Community National Bank, Pettit Law Office and Barton’s Service Center, that work with participants to achieve greater financial stability.

“They still have to repay the loans, of course, but at low rate—6 percent. Compare that to

the interest rates charged by payday loan companies,” says Egan. “This is amazing. It’s giving people hope. It’s giving people a way out.”

Brandy and her family have taken full advantage of the opportunity.

“We were able to take out a loan from First Independent Bank to rebuild our credit and pay off high-interest loans, and we worked with Pettit Law Office to lower our debts,” she says. “With this year’s tax refund, we were able to pay off nine payday loans and credit card bills. When we started, our credit score was in the low 500s. We’re up over 600 now.”

As the first cohort of Aurora Project RISE enters its 18-month maintenance phase, Brandy has a bright outlook on life in her new community.

She wants to move her family into a larger home—whether they rent or buy, whatever makes the most financial sense. She wants to manage her own store at Silver Dollar City, a position with better pay and hours. She wants her family to build their savings to become more resilient for any future financial emergencies.

“I would love to not always have the stressor of money,” she says. “It’ll always be there, but it’s not as bad as when you’re in debt.”

The second cohort of Aurora Project RISE will begin in September, adding to the number of lives improved by the NWP.

2019 Coover grants target rural poverty, health and education

The CFO, in partnership with Commerce Trust Company, presented the Coover Regional Grant program in April. The grants, totaling \$258,000, were awarded to 16 organizations serving rural areas across central and southern Missouri. Several projects have direct ties to the Northwest Project, a multiyear poverty-alleviation program based in Springfield. Three place-based education projects also received grant funding totalling \$62,000 for initiatives benefiting students in rural school districts.

- **Aurora Project RISE**—\$20,000 to support the Reach Independence through Support and Education project to fight the cycle of poverty in Aurora
- **Bonebrake-McMurtrey Foundation Ltd.**—\$20,000 to support the replacement of the 1880s-era roof of the Bonebrake Center in Salem
- **Building Bridges**—\$20,000 to partner with the Workforce Investment Board to address poverty in Joplin
- **Children’s Learning Center**—\$12,111 to improve sensory play opportunities for students at the center in Camdenton
- **Clinton School District, Henry Elementary**—\$14,885 to create a Makerspace STEAM (Science, Technology, Engineering, Art and Math) classroom
- **Community Inter-agency Council**—\$20,000 to improve transportation to medical services for individuals in Howell County
- **Dallas County Area YMCA**—\$12,986 to expand after-school and summer day camp services for older youth
- **Gainesville School District**—\$20,000 to create a learning lab and media center area for students
- **Jesus Was Homeless**—\$19,095 to support the Community Connections–Legal Identification effort to help homeless and impoverished individuals acquire legal identification in Branson
- **Ozark Action Inc.**—\$20,000 to support dental-care programming through the Early Childhood Health Initiative in West Plains
- **Salem Memorial District Hospital**—\$2,923 to support free preventative mammograms to individuals who are either low-income and/or without health insurance in the Dent County region
- **SeniorAge Area Agency on Aging**—\$19,000 to start a satellite site in the Protem area of rural Taney County
- **SoutheastHEALTH Foundation**—\$10,000 for the Reach Out and Read Project in Cape Girardeau, which trains and supports physicians to give books to young patients and advice to parents about reading to their children
- **Ste. Genevieve Museum Learning Center**—\$12,000 to support the installation of an ADA-compliant lift near the main entrance
- **Sustainable Communities and Small Farms Network**—\$15,000 to expand efforts to provide free meals and food supplies to low-income residents of Butler County at the organization’s community center in Harvill
- **West Central Missouri Community Action Agency**—\$20,000 to support the El Dorado Works! Program, a neighborhood-based job readiness program for El Dorado Springs and Appleton City residents



Documentary shows efforts to close opportunity gap

THE FAIRBANKS, ONE OF SEVERAL SPRINGFIELD SITES AND PROGRAMS FEATURED IN THE SERIES, HOSTS SNEAK PEEK AHEAD OF TELEVISED PREMIERE

Based on much of what is said and written about the challenges of growing up today, our land of opportunity is now pocked with gaps in opportunity.

For decades, Harvard sociologist Dr. Robert Putnam has researched these opportunity gaps that emerge for students largely because they are growing up with disadvantaged backgrounds. The “Bowling Alone” author visited Springfield in 2016 and came away impressed with the community’s attempts at solutions.

“What I hope is that we can plant a seed for a grassroots revival,” Putnam said, in explaining his motivation for the series. “That’s the way America has historically solved our problems. And I think we can do it for this problem, too, even though it’s a big, big problem. It’s the kind of problem Americans ought to be good at solving.”

He selected Springfield as one of nine cities to profile for a four-part

series produced with the Media Policy Center called “Our Kids: Narrowing the Opportunity Gap.” The series aired in May on Ozarks Public Television and the CFO hosted a sneak preview of the episode featuring Springfield in April at The Fairbanks, one of the sites featured along with Drew Lewis Foundation founder Amy Blansit.

The segment featured programs including Robberson Community School’s approach to supporting kids and families in its high-mobility neighborhood; OTC’s Middle College program to reduce the drop-out rate among at-risk students; and GO-CAPS, a year-long immersive learning experience for high school students with specific career interests such as medicine or manufacturing.

The CFO joined a number of other national foundations and funders to support production of the series. For more information or to view the trailer, go to ourkidsseries.org.



Brittany (Williams) Chandler, an OTC student featured in the program, was part of a panel discussion that followed the screening and included: Brian Fogle, president of the CFO; Robberson Principal Dr. Kevin Huffman; Drew Lewis Founder Amy Blansit; and Mike Smith, moderator and broadcaster of KSMU and OPTV. The panel shared their personal experiences and observations of poverty and the challenges it presents to children in Springfield.

Understanding the Gap

These are several of the statistics Robert Putnam uses to illustrate the “opportunity gap.”

- About **15 MILLION CHILDREN** or 21 percent of children in the United States live in families with incomes below the federal poverty level.
- Students between the ages of 16–24 from low-income families are **SEVEN TIMES** more likely to drop out of school than those who come from families with higher incomes.
- **31 PERCENT** of the American population cannot read above the 4th-grade level.

AFFILIATES



◀ Bryan Vowels, Chair of Joplin Regional Community Foundation's Philanthropic Society, fills out a presentation check for Kansas City University of Medicine and Biosciences. KCU and Jasper County CASA, were selected by the group's members to receive \$50,000 grants.

‘The Phil’ makes first grants in Joplin

IN THE YEARS FOLLOWING the tragic tornado of May 2011, Joplin Regional Community Foundation—then the Community Foundation of Southwest Missouri—was focused on helping its community heal. By 2016, the affiliate foundation had distributed \$13 million for disaster recovery efforts.

“After that, the board wanted to figure out what to do next,” says Pete Ramsour, foundation coordinator for JRCF. After learning about the power of giving circles from Wendy Steele, founder of Florida-based Generosity Matters and keynote speaker for the CFO’s 2016 Affiliate Appreciate Conference, the wheels began to turn. Board member Susan Satterlee, whose family members attended Southern Methodist University in Dallas, suggested a model similar to a philanthropic group with limited membership from that city.

In January 2018, JRCF board member Bryan Vowels convened the first committee meeting for the Philanthropic

Society, lovingly referred to as “the Phil.” They outlined their vision for the group: Build a sizable high-impact grantmaking fund by limiting membership to 100 with annual dues of \$2,000 for individuals or \$2,500 for families. A small portion of the dues would be set aside for the affiliate’s endowment. They set a modest goal of recruiting 15 members by the end of its first year.

By the time the calendar turned over, they had recruited 54 members and built a grantmaking pool of \$135,000.

On June 19, members of the Phil selected the first grants: Kansas City University of Medicine and Biosciences’ Joplin Campus and Jasper County CASA (Court Appointed Special Advocates) each received \$50,000 grants to address issues relating to children’s health and child abuse reduction. Those community issues were decided upon by members of the Philanthropic Society based on the recommendation of One Joplin, a community partnership involving

many key agencies.

The Phil now has 58 members going into its second year. When the group reaches full capacity, members will have right of first refusal to retain their exclusive membership, which can be passed down to successors.

The immediate success of the Philanthropic Society has already prompted the committee to create new plans for the donations. The group intends to issue endowment-building challenge grants for area agencies, encouraging long-term sustainability for organizations important to the Joplin region. Next year, the dollar amount of grants awarded should be even greater.

“The goal for the Phil was high-impact grantmaking,” said Ramsour. “With \$50,000, an agency can do a lot more than just pay the utility bill. That can truly fund a program, which in turn creates new employment and volunteering opportunities that can really impact a lot of lives in our community.”

Affiliate Updates

NEWS FROM ACROSS THE CFO'S 49 AFFILIATE FOUNDATIONS

Funding partners provide \$145K for affiliates

Through partnerships with outside funders, the CFO was able to award \$145,000 in grants to affiliates in recent months.

Earlier this year, the CFO was awarded \$45,000 to make **Natural Disaster PREP Initiative** grants to affiliate foundations for disaster preparedness projects, made possible through The Funders' Network for Smart Growth and Livable Communities. Five affiliate foundations were selected:

- **Cape Area Community Foundation**—\$10,000
- **Community Foundation of the Lake**—\$6,000
- **Community Foundation of the Hermann Area Inc.**—\$10,000
- **Joplin Regional Community Foundation**—\$9,000
- **Ozark Foothills Regional Community Foundation**—\$10,000

As part of the ongoing **Rural Ozarks Health Initiative**, the CFO received \$100,000 for 10

affiliate foundations.

ROHI is a partnership with the Missouri Foundation for Health to address health issues in communities or regions served by the CFO's affiliates. Each affiliate received \$10,000 to support community health issues and local grant proposals:

- **Alton Community Foundation**—\$10,000
- **Aurora Area Community Foundation**—\$10,000
- **DACO Community Foundation**—\$10,000
- **Dent County Community Foundation**—\$10,000
- **Community Foundation of the Lake**—\$10,000
- **Marshfield Area Community Foundation**—\$10,000
- **Meramec Regional Community Foundation**—\$10,000
- **Nixa Community Foundation**—\$10,000
- **Ozark Foothills Regional Community Foundation**—\$10,000
- **Community Foundation of West Plains**—\$10,000

Rural expert to speak at annual Affiliate Appreciation Conference

Benjamin Winchester, a rural sociologist for the University of Minnesota Extension's Center for Community Vitality, will deliver



the keynote address for the **2019 Affiliate Appreciation Conference** on Friday, Nov. 8,

at the Darr Agricultural Center in Springfield. Winchester conducts applied research on economic, social and demographic topics vital to rural America around the theme of "rewriting the rural narrative."

In addition to breakout panels and discussion topics, the **Affiliate of the Year** awards will be presented during the event, which is free for affiliate board members. To learn more, go to cfzarks.org/affiliateconference.

Around the region

Marshfield Area Community

Foundation's Growth in the Rural Ozarks (GRO) program received a \$5,000 grant from the Missouri Job Center-Ozark Region for the development of a new leadership program. The inaugural program started on April 1 with 12 participants.

Carthage Community Foundation celebrated its 20th year by distributing \$35,000 in surprise grants to community partners. Three grants of \$5,000, \$10,000 and \$20,000 were awarded to Bright Futures Carthage, Area Agency on Aging, and Carthage Junior High School in May. CCF also hosted "Give Carthage Day," an online day-of-giving event that raised more than \$71,000 for 14 agencies.

In partnership with Missouri Foundation for Health and Christian Action Ministries, **Community Foundation of Taney County** and **Table Rock Lake Community Foundation** have embarked on a two-year research project to address the epidemic level of poverty in Stone and Taney counties.

New volunteer leaders take reins at affiliate foundations

Several CFO affiliates changed leadership between fall 2018 and the end of the 2019 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.



Cape Area Community Foundation

Outgoing: Michelle Jones
Incoming: Stan Irwin



Cassville Community Foundation

Outgoing: Mike McCracken
Incoming: Chad Johnson



Dallas County Community Foundation

Outgoing: Bill Monday
Incoming: Shiloh Weaver



Hickory County Community Wellness Foundation

Outgoing: Stacy Couless
Incoming: Abby Gordon



Joplin Regional Community Foundation

Outgoing: Mike Gray
Incoming: Gary Duncan



Marshfield Area Community Foundation

Outgoing: Kimberly Clark
Incoming: Alan Thomas



Mount Vernon Area Community Foundation

Outgoing: Steve Fairchild
Incoming: Bethany Patterson



Republic Community Foundation

Outgoing: David Brazeal
Incoming: Sandy Peabody



Table Rock Lake Community Foundation

Outgoing: Jim Holt
Incoming: Eric Chavez



Truman Lake Community Foundation

Outgoing: Randy Shipman
Incoming: Jim Cook



Willard Children's Charitable Foundation

Outgoing: Jacquie Gray
Incoming: Amanda Brown

AGENCIES

The Right Tools for the Job

THROUGH THE AGENCY PARTNER PROGRAM, NONPROFIT ORGANIZATIONS CAN BUILD MORE THAN CAPACITY FUNDS

NEARLY 600 NONPROFIT AGENCIES in central and southern Missouri have established funds with the CFO to join the Agency Partner Program. In addition to responsible, effective management of their funds, these organizations enjoy numerous benefits that come with the partnership.

Capacity funds with flexibility

Most agency partners have a capacity fund held at the CFO, often for day-to-day operations. “Capacity funds are great because of their flexibility,” says Zach Clapper, manager of the Agency Partner Program at the CFO. “I compare them to a savings account. They draw a nice rate of return from either our cash or diversified options, and the funds are still liquid — unlike endowments.”

Thanks to that flexibility, helping fund day-to-day operations isn’t the only way agencies can use a capacity fund. Connect2Culture, an arts organization in Joplin, recently unveiled plans for the Harry M. Cornell Arts & Entertainment Complex. Construction will be funded, in part, by a capital-campaign fund established in 2014.

“The CFO’s ability to receive multiple forms of donations — whether it’s cash, IRA distributions or appreciated-asset transfers — and provide proper legal notice to donors is a huge timesaver for us,” says Clifford Wert, President and Chief Financial Officer for Connect2Culture. “That the CFO is structured so all funds are FDIC insured at such an excellent rate is extremely valuable.”

Wert also cites the convenience of CFO’s online donor services platform.

“Making sure donations have been received and seeing the current values of our funds on Donor Central is a great resource,” he says. “We can easily send requests for expenses to be paid from the funds in such short order.”

Capacity funds can also be used as emergency reserves, holding money long-term but maintaining liquidity.

Endowment funds

For agencies seeking permanence and sustainability, another fund option is an endowment. Gifts made to the fund are permanently held, while a portion of the interest returned to the fund may be spent



as necessary, allowing the fund to grow in perpetuity.

“We appreciate knowing that our endowment funds are conservatively invested,” says Wert. “It’s good to know they’re still growing with a solid return while limiting market risk.”

Endowment funds are invested in the CFO’s diversified option with an historic interest rate of 7.5 percent. Earlier this year, 12 agencies made substantial gains in their endowment funds through the Endowment Match Challenge.

CauseMomentum.org

Agencies seeking to raise funds online have access to CauseMomentum.org, the CFO’s own crowdfunding website. Connect2Culture recently used CauseMomentum to supplement

its capital campaign fund, inspiring online gifts with a \$5,000 match from a generous donor.

“We don’t typically hold other fundraising campaigns throughout the year, so events like Give Ozarks and Give Joplin Day and the CauseMomentum project give us a great opportunity to reach out to the public,” says Emily Frankoski, Community Arts Director for C2C.

The site, which can be used for specific projects or giving day events, offers a lower platform fee and faster fund distribution than other options.

Board development

An agency is only as strong as its board. To help energize members and inspire leadership, the CFO can assist agencies with board engagement. Last year, CFO President Brian Fogle assisted the board of directors at Isabel’s House with strategic planning.



Agency Partners by the Numbers

595

Number of Agency Partners

Number of Agency Partner capacity funds: **762**

Number of Agency Partner endowment funds: **282**

TOTAL: 1,044



\$98,950,950

Total Agency Partner Assets

▲ CFO agency partner Connect2Culture is spearheading the effort to build the Harry M. Cornell Arts & Entertainment Complex in Joplin. The 46,000-square-foot facility will house several performance spaces and galleries for Spiva Center for the Arts.

“This whole year has been shaped by the three top goals that we chose with his guidance,” says board president Debbie Howell. “I love Brian’s attitude. He has an incredible background, he knows the trends and the data. And the fact that he did it pro-bono — we’ve paid consultants thousands of dollars to provide the same service.”

Staff education

Throughout the year, the CFO provides free workshops and seminars for agency partners on a variety of topics. Recently, agencies have had the opportunity to learn about fundraising best practices, tax law updates, cybersecurity protocols and more. CFO staff can also provide resources for discussing planned giving with donors.

Grant opportunities

While not exclusively available to agency partners, information about upcoming grant rounds from the CFO, its affiliates and other funds is readily shared in the Agency Partner e-newsletter.

Administrative support

As manager of the Agency Partner Program, Zach Clapper provides back-office administrative support for partnering organizations, which can be especially helpful for newly established agency partners or those with limited staff. Services can include sending tax-acknowledgement letters to donors, processing distributions to vendors and managing donor data.

Top 10 agencies by fund assets

1. Ozarks Food Harvest
2. Connect2Culture
3. Care to Learn
4. The Kitchen, Inc.
5. Ozarks Medical Center Foundation
6. Community Blood Center of the Ozarks
7. Ozark Regional Land Trust
8. Breast Cancer Foundation of the Ozarks
9. Community Hospices of America Foundation LLC
10. Three Rivers Endowment Trust

Top 5 agencies by length of relationship

- | | |
|--|------|
| 1. Council of Churches of the Ozarks | 1986 |
| 2. Gray-Campbell Farmstead | 1988 |
| 3. Springfield Ballet | 1988 |
| 4. Ozark Trails Council, Boy Scouts of America | 1990 |
| 5. Ozarks Health Advocacy Foundation | 1990 |

Top 5 Affiliate Foundations by number of agencies

- | | |
|---|----|
| 1. Joplin Regional Community Foundation | 30 |
| 2. Carthage Community Foundation | 22 |
| 3. Truman Lake Community Foundation | 22 |
| 4. Community Foundation of Taney County | 19 |
| 5. Community Foundation of the Lake | 18 |

ALL NUMBERS AS OF MAY 2019



Terry and Mary Kay Meek, center, instilled the value of giving back to the community in their four children, including sons, Mike, left, and Charlie, right.

Passing the Torch

**TERRY AND MARY KAY MEEK
LIGHT THE WAY FOR KIDS
TO JOIN GIVING TRADITION**

The Meek family has helped build the Ozarks in more ways than one.

For four generations, they owned lumberyards and home improvement stores that supplied materials for homes and buildings across the region. Chief among their many charitable interests is their support for Springfield Catholic schools. And Mary Kay Meek's leadership at the CFO during a crucial time in its history helped assure the young foundation's long-term stability.

Next year will be 30 years since Mary Kay Meek served as the Board Chair from 1990-92; Terry's brother, Bill, served as Chair a few years earlier from 1981-82.

Now, Terry and Mary Kay are extending their family's charitable legacy by bringing the next generation into the CFO's fold. After the sale of Meek's Lumber in 2018, each of the Meek's four children opened donor-advised funds at the CFO to continue the example their parents set for them in giving back to the communities that supported them.

"With mom and dad, it was always just a part of life that community service and everything that happens in the Ozarks takes leadership and with that leadership, you also need dollars," says oldest son, Charlie Meek. "My wife and I just always loved that and learned from

them and tried to be involved in the community and make it a better place.”

Before the community foundation was created in 1973, most giving in Springfield was directed toward individual charities. The community foundation allowed people to make tax-deductible contributions into a fund and then decide how to direct their charitable giving. That concept of donor-advised funds was revolutionary at the time, Terry Meek says.

“I felt that was the great idea—you could put money in and you didn’t have to decide today exactly where you would like to direct those funds,” he says. “Sometimes it’s hard. You are busy. At different times in life, you have more cash available. It’s nice to be able to place that money in a fund where at a later date, the funds still remain there and draw a really nice return.”

It was during Mary Kay’s board service that the volunteer group decided to hire its first paid staff member, Jan Horton. They then sought, and received, a \$100,000 challenge grant from the Charles Stewart Mott Foundation to build an administrative endowment. Terry and Mary Kay made the leadership gift toward the matching requirement. It was a transformative step for the CFO’s sustainability.

A few years later, as the CFO expanded by adding affiliate foundations across the region, the Meek family was growing its lumber and home improvement business. Founded in 1919 in Lockwood, Meek’s grew to about 50 yards run by Terry in Missouri and northern Arkansas and Bill Meek out in California where their dad had gone to find timber and open a sawmill to overcome shortages after World War II.

After many changes to their business model from the advent of “big-box” chains and changing markets, the family decided to sell the company, which still operates as Meek’s under its new ownership by American Construction Source. It was that “liquidity event,” as they call it, that created the opportunity for the Meek’s four children to establish their own donor advised funds. Terry is proud that even though their daughters, Maggie Meek Garner and Annie Meek Montgomery, live in Boulder, Colo., and Brooklyn, New York, respectively, they decided to place their funds at the CFO, along with Charlie and Laura Meek and Mike and Katie Meek.

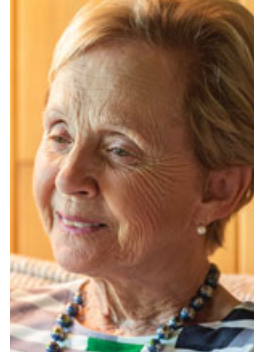
“Even though this transition had been in the planning stages for us for several years, I don’t think any of us were ready when it actually happened,” Charlie says. “To have the Community Foundation there so you can say ‘I don’t have to make a decision today, I don’t have to make a bad decision. I can delay and think about it and see the opportunities and see where the money can do the most good’ was a huge relief.”

Mike says he’s interested in issues like improving access to preschool education and college education. A member of the Ozark Greenways Board of Directors, he’s also passionate about the trail network as one of the amenities that promote health, peace of mind and neighborhoods.

“We’re excited to be a part of it,” Mike says. “I think there is a certain ramping-up process for a new donor to get educated about everything the Community Foundation does and what opportunities there are. I know as time goes on, we are going to be excited to learn more about how we can to continue to help out.”

“I think a lot of people didn’t have any idea of what was going on with this new community foundation and they didn’t care. But the **ones who were interested in the community**, they seemed to appreciate what all of us did.”

—MARY KAY MEEK



“I don’t know anyone who grew up in Springfield who isn’t kind of **married to Springfield, wherever they live**. Our daughters both, without question, said if they are going to give, they want to give through the Springfield foundation.”

—TERRY MEEK

“Once you make the economically hard decision of ‘let’s commit the funds now,’ you’ve then got the ability to **research and determine who you want to benefit**. I think that’s appealing for anyone that wants to give.”

—MIKE MEEK



“The Community Foundation keeps the money working and you get a lot of feedback on what generates excitement and opportunity for the Ozarks. **It’s very synergistic**. It allows everyone to participate in making the Ozarks a great place to live.”

—CHARLIE MEEK

REMEMBERING
DR. BILL PRATER

Vision & Devotion

A VERY GENEROUS GIFT to the annual Founders Fund came from the Prater family when they decided to designate the memorials made in honor of Dr. Bill Prater, who died on Jan. 18. His family requested memorial contributions to the CFO and selected the Founders Fund, which helps support the CFO's operating costs.

A U.S. Army veteran, Bill Prater returned to Missouri after World War II and received his doctorate in ophthalmology from Washington University. In St. Louis, he met Marie Haas, also from Springfield, and the two shared 62 years of marriage. Mrs. Prater survives her husband, along with their children Dr. Tom Prater and his wife, Kim; Chris Prater, and his wife, Karen, of Wichita; Amy Wesner and her husband, John, of Dallas; and five grandchildren.

Drs. Bill and Tom Prater practiced together at Eye Surgeons of Springfield, where Dr. Bill Prater helped establish modern cataract surgery in the Ozarks.



Dr. Bill Prater's family designated memorials made in his honor to support the CFO's annual Founders Fund.

Dr. Tom Prater now practices at Mattax Neu Prater Eye Center.

The Prater family has a long history with the CFO. Marie Prater is a former member of the Board of Directors and received the annual Humanitarian Award in 2007 for her work with The Kitchen Foundation. Dr. Tom Prater served as the CFO's Board Chair in 2009-10 and has participated on a number of committees and special projects, including the founding of the Rural Schools Partnership program. Drs. Tom and Kim Prater also served as co-chairs for Every Child Promise, which aims to give all Springfield kids access to quality pre-school education.

"Dad was a big fan of the Community Foundation. He understood the role it plays, not just in distributing funding for the community, but in identifying needs and helping to provide solutions," Tom Prater said. "And mom agreed that this would be the best use of memorial contributions from her experience on the Board of Directors."

Legacy Society

The following people have made planned giving commitments to benefit the CFO or one of its affiliate foundations from July 1, 2018 through May 31, 2019.

Springfield

Ken and Linda Neale
David E. O'Reilly
Mrs. Marilyn Wright

**Joplin Regional
Community Foundation**

Sandra J. and Henry G.
Morgan

**Barton County
Community Foundation**

Nancy Curless
Bob and Judy Rice

**Greater Seymour
Area Foundation**

Gary L. Childress and Donna
A. Childress

**Dent County
Community Foundation**

Mary Beth Cook

**Stockton Community
Foundation**

William Jenkins

Professional Advisors Council

The CFO welcomed four new members to its Professional Advisors Council over the past year. The PAC is comprised of 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, contact Winter Kinne, Vice President of Development, at (417) 864-6199 or wkinne@cfozarks.org.

Teresa Baird, Baird,
Lightner, Millsap PC,
Springfield

Jeramie Grosenbacher,
Edward Jones, Aurora

Michael Kellermann,
Commerce Trust
Company, Springfield

John Vaughan, 417Law,
Springfield

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.

What can **Philanthropy** do?

CHANGING CULTURE HIGH IMPACT INVESTMENT
PROBLEM SOLVING COLLABORATION INVESTMENT PLACEMAKING
HIGH IMPACT COMMUNITY BUILDING PROBLEM SOLVING
INVESTMENT PLACEMAKING CULTURE CHANGING
PROBLEM SOLVING COLLABORATION INVESTMENT
CULTURE CHANGING HIGH IMPACT COMMUNITY
COLLABORATION INVESTMENT PLACEMAKING
HIGH IMPACT COMMUNITY BUILDING PROBLEM SOLVING
INVESTMENT PLACEMAKING CULTURE CHANGING HIGH IMPACT



The Philanthropy Summit

WEDNESDAY, OCTOBER 23 • THE DOUBLETREE IN SPRINGFIELD • CFOZARKS.ORG/SUMMIT



PROGRAMS

Shine a Light

NEW GRANT PROGRAM CALLS ATTENTION TO DIVERSE POPULATIONS AND OPPORTUNITIES FOR INCLUSIVITY IN SPRINGFIELD AREA

The CFO introduced a new grant round focused on diversity and inclusion that tapped into a well of ideas to address needs and highlight cultures of underrepresented populations in Springfield-Greene County.

Community members gathered in December at the newly renovated Timmons Hall to celebrate the six successful proposals. Projects range from celebrating Hispanic and African American heritage and culture to addressing racism and supporting inclusive LGBTQ practices and young adults transitioning out of foster care.

“We are delighted to launch this program and hope it increases visibility of the important work occurring in the fields of diversity and inclusion in our community,” said Bridget Dierks, Vice President of Programs for the CFO. “This work is important to the health of our community, and the CFO is proud to designate grantmaking assets to bring light to these efforts.”

In the following months, projects supported by the grants have taken shape that celebrate cultural elements from the city’s past and present.

The Springfield-Greene County African American Heritage Trail was first announced during the annual Park Day Reunion on Aug. 3, 2018, at Silver Springs Park, the site of Springfield’s only public park open to black residents

during segregation. Organizers of the trail had designated as many as 20 sites in the city to commemorate with large historical markers that would share the stories of important locations and influential residents.

The first marker, recognizing Silver Springs Park, was unveiled a day prior to the grant presentation in December. Grant funding from the Diversity and Inclusion program will support three additional signs, to be located at Lincoln Memorial Park Cemetery, the site of Alberta’s Hotel on Benton Avenue and the site of the former Graham’s Rib Station and Guest Cabins on East Chestnut Expressway.

“The signs are ordered, and it’s an eight-week fabrication process,” says Lyle Foster, a member of the committee and an assistant professor of sociology and anthropology at Missouri State University. “By early fall, the signs should be back and installed on the trail.”

In a related effort, the committee is working on publishing a coloring book that came out of this year’s Black History Summer Academy, a program coordinated by Gwen Marshall.

“Each page will have an abbreviated story about the markers,” says Foster. “It’ll be a great way to share the history with younger children.”

At nearby Drury University, a collaboration with Grupo Latinoamericano

now extends beyond the classroom and onto the airwaves. Grant funding was used to produce “Hola Springfield,” a show on Drury’s student-led radio station, to promote awareness of Hispanic culture and issues in the city.

In the first episode, Grupo Latinoamericano President Yolanda Lorge and former Drury communications professor Dr. Lina Gomez-Vasquez discuss the 25-year history of the organization and its roots in traditional dances of Latin American cultures.

“Part of the mission is to preserve our



Springs Park
the Fairbanks Pasture,
superintendent of
On Easter Eve, 1906,
for black residents who
had lynched three
are.

is the city's only
ents and various
ball. The WPA built
Silver Springs Pool,
k in the 1930s.

Park is the home
ated with a parade,
rbeque picnic
gust.

◀ Lyle Foster, facilitator with the Springfield-Greene County African-American Heritage Trail Committee, shows off the group's first historical marker at Silver Springs Park. A grant from the Diversity & Inclusion Program provides fund for three additional markers.

iEscuchen!

Listen to episodes of the collaborative radio show between Grupo Latinoamericano and Drury University online at cfozarks.org/holasgf.



◀ Dancers perform at Grupo Latinoamericano's Cinco de Mayo celebration at Springfield Art Museum. Sharing traditional dances and other Latin American folk activities with others is an integral part of the organization's mission.

PHOTO PROVIDED BY DRURY UNIVERSITY



FY19 Diversity & Inclusion Program Grant Recipients

- **Drury University and Grupo Latinoamericano**—\$14,999 to support a partnership to develop awareness of Hispanic cultures in Springfield and strengthen Grupo Latinoamericano's mission and initiatives.
- **FosterAdopt Connect and Fresh Start Furnishings**—\$4,334 to support efforts to provide safe, stable, furnished living environments for young adults transitioning out of foster care.
- **Friends of Timmons Temple, Springfield-Greene County Park Board, NAACP and other partners**—\$10,000 to provide funding for a free six-month cultural performance series at the newly reborn Timmons Hall.
- **The GLO Center, PROMO, Springfield Black Tie and Commercial Street Community Improvement District**—\$11,500 to expand the Ozarks Inclusion Project, which encourages businesses in Springfield and Greene County to move toward inclusivity by adopting policies and practices that support the LGBTQ+ community.
- **Missouri State University and Facing Racism**—\$7,500 in scholarship assistance for nonprofit and public-entity employees to attend the Facing Racism workshop, designed to uncover racism and create understanding of its impact on individuals and the workplace.
- **Missouri State University and Springfield-Greene County African-American Heritage Trail**—\$11,667 to support the costs associated with three African-American Heritage Trail markers.

FY20 Grants from the CFO

Nearly \$1.4 million in discretionary grants will be awarded by the CFO in fiscal year 2020. Highlights include:

- Louis L. and Julia Dorothy Coover Charitable Foundation programs offer \$250,000 for rural proposals and \$60,000 for place-based education projects
- Diversity & Inclusion grant cycle increases to \$80,000
- Springfield-Greene County Collective Impact Grant Program continues with \$120,000
- Third year of Rural Ozarks Health Initiative provides \$100,000 for affiliate foundations
- New capacity-building program launches for Agency Partners

Go to cfozarks.org/applyforgrants to learn more.

heritage, especially for children,” Lorge says. “I have noticed that, for Latinos and Hispanics that were born and raised here, certainly second and third generation, they know very little about themselves, about their countries of origin, about their culture.”

The primary objective of the project is improving the visibility of Grupo Latinoamericano and awareness of Hispanic diversity issues in Springfield. In addition to the radio show, Drury students will assist Grupo Latinoamericano with a website redesign, social

media marketing and traditional promotion through bilingual material.

The project also includes personal financial and media literacy workshops led by Drury professors for the Spanish-speaking community and events during National Hispanic Heritage Month in September and October. On campus, Drury's Meador Center will host an immigration and citizenship training workshop. Training sessions were previously hosted by Grupo Latinoamericano, but demand has exceeded the organization's capacity.

INVESTING IN RURAL EDUCATION

**A NEW PARTNERSHIP WITH
MSU-WEST PLAINS CEMENTS THE
OZARKS TEACHER CORPS PROGRAM
IN SOUTH-CENTRAL MISSOURI**

► *Shirley Lawler, Chancellor for Missouri State University-West Plains, speaks to educators and school administrators at the Rural Schools Forum on April 4 at the campus in south-central Missouri. Eight \$1,100 renewable scholarships to participate in the Ozarks Teacher Corps are now available for MSU-WP students.*

In 2009, the former educators who had moved into leadership roles at the Community Foundation of the Ozarks were seeing firsthand how rural schools and rural communities were mutually dependent for each other's success.

They envisioned how to use the CFO's philanthropic resources to strengthen rural education so schools could anchor and sustain their communities.

Out of that came the Rural Schools Partnership, which included the Ozarks Teacher Corps. Each year since 2010, two-year renewable OTC scholarships were awarded to eight to 10 teacher-education majors in return for their commitment to teach for at least three years in a rural district and participate in the learning network.

About 80 students have gone through the Ozarks Teacher Corps. Many have extended their rural teaching well beyond their three-year commitments. Several have moved into administrative roles. Their school districts and communities are stronger for their energy and passion for rural renewal.

In addition to scholarship funds, the Ozarks Teacher Corps program includes special training in place-based education, mentorship from OTC alumni and connection to a network of rural educators and rural-education advocates.

As the Rural Schools Partnership approaches the 10-year mark, former CFO President, Dr. Gary Funk, and his colleagues Dr. Julie Leeth and Carol Silvey, have now expanded the concept across the Midwest and other areas of the country through the Rural Schools Collaborative.

Leeth, now semi-retired from the CFO while still working as the education/schools liaison, recognized that a hub of success for the OTC has been the Missouri State University-West

Plains campus. Beginning this year, MSU-WP will administer the scholarship program on the CFO's behalf.

"We are so excited to partner with the Community Foundation of the Ozarks to establish this scholarship program for students interested in entering the field of education," MSU-WP Chancellor Shirley Lawler said.

"Many of our students are focused on obtaining a teaching degree, and they want to return to their hometowns to teach, which, in many cases, is a smaller, rural community," she added.

MSU-WP is developing a curriculum to build a skill set specific to rural teachers that will include mentorships, innovative approaches, and on-site learning in rural districts.

"The CFO and the Ozarks Teacher Corps are thrilled to establish a formal partnership with MSU-West Plains to recruit and retain the finest teachers possible for the south-central region of Missouri," Leeth said. "The scholarship will now be a four-year award and is made possible through the generous bequest of Chesley and Flora Lea Wallis.

"Furthermore, this alliance will mean a lot to the emerging rural teacher corps higher education network, which is growing with support from the Rural Schools Collaborative."



Ozarks Teacher Corps earns high marks from participants

NEW REPORT DETAILS POSITIVE IMPACT OF RURAL EDUCATOR DEVELOPMENT PROGRAM

A NEW STUDY SHOWS PARTICIPANTS in a Community Foundation of the Ozarks' scholarship program to develop rural educators have a 92 percent placement rate, with three-quarters of them still teaching in the districts they joined after graduation and most planning to continue their careers in a rural setting.

These are among the key findings in a report on the program released during the Rural Schools Partnership Forum at Missouri State University-West Plains. The Ozarks Teacher Corps is a centerpiece of the Rural Schools Partnership, a CFO program to connect rural schools and the communities they anchor through the principles of place-based education.

Conducted by the Rural Schools Collaborative of Cambridge, Wisc., "Ozarks Teachers Corps: Placement, Retention & Perceptions, 2010-2019" surveyed participants in the scholarship program to support teacher-education majors willing to commit to teaching in a rural district for at least three years after graduation. Since its inception in 2010, the Ozarks Teacher Corps has grown to 89 members.

Currently, 18 teacher-education students from MSU, MSU-West Plains, Drury University and Evangel University are involved in the program.

"This report gives us a great update on the careers of our Ozarks Teacher Corps graduates," says Dr. Julie Leeth, education liaison for the CFO and coordinator of RSP and Ozarks Teacher Corps. "It also gives us needed insight on what we can do to improve the program to have an even greater impact on rural education in the Ozarks."

Other key findings from the report:

- Of the 71 participants who should have graduated, gained certification and transitioned to teaching, 65 successfully completed the program and are currently teaching in a rural school or have honored their three-year commitment. This represents a 92% placement rate.

- 74 percent of participants are still teaching in the school districts that hired them out of college.
- About 20 percent of respondents are math and science educators.
- 77.1 percent of respondents said the Ozarks Teacher Corps "definitely" helped them develop a better understanding of rural issues.
- Two-thirds have implemented place-based education in their classroom or promoted it in their schools. Place-based education is a fundamental focus of the Ozarks Teacher Corps.
- Nearly 60 percent are teaching in or within 30 miles of their hometown.
- All respondents said they would recommend a career in rural education to others.

The report also revealed several areas of concern. Though many are still early in their careers, more than 40 percent of participants have not taken any graduate-level courses and only three are currently serving in administrative roles. Furthermore, nearly 60 percent have not received external funding, a strong focus of the program, to support their instructional activities.

Participants also provided feedback in the form of suggestions for the program and reflections on their careers in education. "I thoroughly enjoyed my time in the Ozarks Teacher Corps, and although I did not know if I would stay at my original school, I have," writes one participant. "I love working at this school and felt that my choice to work in a rural district has been affirmed over and over again."

Since its inception in 2010, the Ozarks Teacher Corps has awarded more than \$800,000 in scholarships and placed more than 60 teachers in rural Ozarks schools. The program is funded by the Chesley and Flora Lea Wallis Trust. Beginning with the 2019-20 school year, the scholarship program will be offered in partnership with MSU-West Plains.



92%

PLACEMENT RATE FOR OZARKS
TEACHER CORPS PARTICIPANTS

20%

RESPONDENTS THAT TEACH
SCIENCE OR MATH

67%

RESPONDENTS WHO INCORPORATE
PLACE-BASED EDUCATION IN
THEIR CLASSROOM OR PROMOTE
IT IN THEIR SCHOOLS

100%

RESPONDENTS WHO WOULD
RECOMMEND A CAREER IN
RURAL EDUCATION TO OTHERS

Coming to Fruition

A LEGACY BLOOMS WITH NEW SCHOLARSHIP FUNDS TO BENEFIT STUDENTS IN CENTRAL MISSOURI



FRED SCHIERLOH'S LEGACY IS ROOTED in the soil of his family's farm in rural Missouri. As a boy, working the fields with a tractor alongside his father, he discovered his aptitude for mechanical systems. At the school in nearby Belle, he learned the importance of a good education.

His expertise in mechanical engineering blossomed, leading to a successful career at General Motors, COSA Xentaur

Corporation and the National Center for Tooling and Precision Components. Understanding how education can transform lives, he helped develop the Technical Center at the University of Toledo Technical College.

Through his diligent work and wise investments, he was able to accumulate a modest fortune—but he knew that without his advanced education, his wealth would not be possible. He also acknowledged that the cost of such an education can be a barrier for many students. Before his death in 2016, he designated a sizable portion of his estate to benefit high school graduates and students pursuing technical training.

Now, 75 years after his birth on that small family farm, the first of many scholarships from the Schierloh family will be awarded. Through his estate, two endowed scholarship funds totaling \$1.4 million were established with Meramec Regional Community Foundation and the Community Foundation of the Ozarks. One will award scholarships to graduates of the Maries

State Technical College of Missouri in Linn, just east of Jefferson City, provides students with advanced technical training in a variety of fields. State Tech students can now apply for scholarships from the Schierloh Family Fund through the CFO. PHOTO PROVIDED BY STATE TECH

R-II School District in his hometown of Belle, about 30 miles north of Rolla; the other will benefit students entering the State Technical College of Missouri, located nearby in Linn.

“By Fred’s gift, it is evident that he had fond memories of his alma mater and growing up in Belle,” said Jan Sassmann, chair of the Maries County R-II Schools Foundation. This year, one graduate of Belle High School—where Fred received his diploma in 1962—will receive a renewable \$3,000 scholarship. The Schierloh Family Fund will award additional scholarships in coming years.

Shannon Grus, vice president of advancement at State Tech, said the Schierloh Family scholarship “will offer students the opportunity to earn a life-changing degree.” Ultimately, the Schierloh Family fund will provide three renewable \$5,000 scholarships.

But, according to Grus, who also serves as president of Owensville Area Community Foundation, the scholarship is only part of Fred’s legacy. “We also hope that this generous gift will encourage others to see the value of a technical education and consider making a scholarship commitment to encourage even more students.”



The high school in Belle, part of the Maries R-II School District, where Fred Schierloh graduated in 1962.

PHOTO PROVIDED BY MARIES COUNTY R-II SCHOOLS FOUNDATION



Young leaders learn power of community, collaboration

Members of Youth Empowerment Project chapters gathered in Springfield in February for the annual YEP Conference to learn how leadership, volunteerism and charitable gifts can improve communities.

Keynote speaker Rob Blevins, executive director for Discovery Center of Springfield, shared a message of encouragement. “Don’t let anyone tell you that you’re too young to make an impact,” he said, sharing several stories of young people who changed the world.

On April 11, the Springfield City chapter spent the day putting those words into action. The group distributed a total of \$2,000 to Diaper Bank of the Ozarks, FosterAdopt Connect, Harmony House and Newborns in Need, then packaged several layettes for Newborns in Need before heading back to class—just another normal day for the next generation of philanthropists.



A Final Word

A NOTE FROM CFO PRESIDENT BRIAN FOGLE



You know you're from the Ozarks if...

We could finish that sentence with a lot of things, couldn't we? Like if you rode the Wild Mouse at Doling Park, or you bought clothes from Barth's. You had brown beans at Red's, or ate chicken livers from the Heritage and actually liked them.

One memory I distinctly remember from my younger days in Aurora was a local appliance store having their annual "Christmas in July" sale. It always seemed a bit strange to see the proprietor in a Santa hat while I was thinking about the swimming pool and flip-flops.

In a way, the CFO celebrates its own holiday in July as well. Because our fiscal year ends June 30, we already have started reflecting on this past year. It's been a productive one:

- We continue to help students follow their hopes and dreams by assisting them with scholarships. This year, we have helped nearly 1,000 from the region. Who knows—in that group might be our next governor, the scientist who finds the cure for cancer or a future pillar of our community?
- After the third year of the Northwest Project, we've seen 271 lives positively impacted, with average household incomes increasing 32 percent, or \$505 per month.
- The Growth in the Rural Ozarks initiative continues to see progress in

the five participating communities. This year, a great group of MSU students helped the communities with social media outreach and launched the Create Here program to lure new entrepreneurs to their towns.

- For the first time, we offered a grant round to promote diversity and inclusion in Springfield.
- We deepened our partnership with Missouri Foundation for Health to bring critical resources to our rural areas.
- We continued in our effort to build our own capacity through a strategic planning process involving board members and constituents.
- This is all on top of our "regular business" of taking in an average of 100 gifts every business day and helping our donors meet their charitable goals.

I could go on, like one of those holiday letters you receive every year from Aunt Hilda, but I know you may have a swimming pool and flip flops you'd like to get to. It's been a great year, and everyone who is reading this has helped with our mission of improving the quality of life for everyone in our region. Thanks for everything, and Happy New Fiscal Year!

A handwritten signature in dark ink that reads "Brian Fogle".

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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PARTING SHOT: At the beginning of the school year, John Sharp, a Greenwood Laboratory School senior, worked with Under Armour to secure discounted shoes for Robberson Community School students. At the end of the year, the Just For Kicks Fund—established by John and his sister, Meredith—received a \$1,000 grant from Gatorade’s Play It Forward program thanks to fellow Greenwood student Aminu Mohammed, the Gatorade Missouri Boys Basketball Player of the Year. John and Meredith’s charitable instincts may be hereditary — their father, Dr. Frank Sharp, participates in the Weaver Orthodontics Program, and their grandfather, Bill Hardie, is a longtime CFO supporter who served as the Board Chair in 1999–2000.