

PASSION & PURPOSE

THE CFO MAGAZINE  SUMMER 2021



Philanthropy's New Territory

Three new regional affiliate foundations overcome pandemic fundraising challenges to bring charitable resources to rural communities

ALSO INSIDE: PLACEMAKING ALONG THE FINLEY · YOUNG COUPLE PLANS FOR FOREVER · EARTH DAY ENDOWMENTS · PURSUING EXCELLENCE IN INCLUSIVITY

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

ON THE COVER: These folks were able to accomplish what others had been unable to in the past—establish a community foundation for Nevada. Learn more about the Nevada/Vernon County Community Foundation and the two other new members of the CFO's Affiliate Foundation network on page 5.

SAY HELLO ...

The CFO has welcomed several new staff members since late 2020.



Martha Amlin is the part-time Accounts Receivable Coordinator. She started as a temporary employee through Penmac before joining the staff as part of the Finance Department's restructuring.

Holly Beadle is the new Director of Philanthropic Services, working with CFO nonprofit partners. She previously served as Executive Director at Isabel's House. She took the position after Zach Clapper joined the Denver Foundation.



Martha Hermosillo is the Foundation Coordinator for the Community Foundation of the Hermann Area Inc. She joins the group of six affiliate coordinators.

Christi Rodriguez is the part-time Accounts Payable Coordinator. She also joined the staff after starting as a Penmac temporary employee in the Finance Department.



Millie Schuchmann joined the CFO as the Development Coordinator, a new position for FY22 that will support both the Development and Affiliate departments. She previously worked at Harmony House.

... AND A FOND FAREWELL

We also share our deep appreciation to **Dr. Julie Leeth, Ed.D.**, who retired officially as of June 30. Julie had been the CFO's current longest-tenured employee, joining in 2004 as a second career after retiring from leadership in Springfield Public Schools. She served in a number of roles, notably as Executive Vice President prior to her partial retirement in 2017. She helped found the CFO's nationally recognized Rural Schools Partnership, including the innovative Ozarks Teacher Corps scholarship program. We thank Julie for her work and leadership during an extensive period of growth for the CFO and offer our very best wishes to Julie, and her husband, Bruce, for a happy and active retirement.





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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Letter from the Chair

A NOTE FROM OUTGOING BOARD CHAIR RHONDA CHRISTOPHER

What a year! As I accepted the CFO Chair's gavel during a June 2020 meeting, held partially in person and partially on Zoom during the lull between our region's first and second COVID-19 surges, the world was a very uncertain place.

Economic uncertainty, job cutbacks and losses, numerous disruptions and cancellations, and full hospital wards didn't bode well for anyone. We were especially concerned with the impact on donors as their charitable gifts power the nonprofit agencies that serve our most vulnerable populations.

And yet, I'm amazed at where we stand one year later. The giving spirit in our communities lifted us, anchored us, sustained us and bonded us through the difficult times we experienced.

To our astonishment, gifts to the CFO over the past fiscal year were the highest in history at \$73 million. The giving spirit was shown through the \$5 and up donations on Give Ozarks Day in March, which totaled more than \$700,000. In addition, we received generous grants from outside foundations along with planned estate gifts from foresighted individuals for community benefit. These charitable dollars fueled our ability to support pandemic recovery while continuing ongoing work associated with the many interests of our donor advisors.

The region's nonprofit community has also been nothing short of remarkable. They collaborated to stretch resources to help as many people as possible. They found ways to protect their volunteers and staff members when in-person services were necessary and scraped together technology to send staff home to work when required. They restructured their operations to meet the needs of the populations they served. They got creative and found ways to transition annual events and arts performances online. The nonprofit

community's commitment to their mission was certainly tested, yet they persevered.

In our corner of downtown Springfield, the "Philanthropy Row" leaders (the CFO, United Way of the Ozarks and Community Partnership of the Ozarks) met often to make sure gaps were filled and duplication was minimized. They also tackled large-scale issues like housing unsheltered residents to reduce potential disease outbreaks among this vulnerable group and the community as a whole.

The CFO's professional advisors—financial, legal and investment professionals—who, in their day jobs, are competitors within their industry sectors, consistently came together to bring their best thinking to the table, helping the CFO continue to fulfill its mission of "enhancing the quality of life in our region through resource development, community grantmaking, collaboration and public leadership." These men and women guided their clients who had a passion for charitable giving and served as volunteers on committees like the Investment Advisory Board, Audit Operations and numerous grant selection committees.

During a time when many didn't feel hopeful and rural America was struggling, leaders in four communities

across our region had enough confidence in the future to raise funds to start new affiliate foundations. These leaders in Nevada/Vernon County, Ash Grove, Cabool and Fair Grove are betting on the future by using the engine of an affiliate foundation to drive charitable giving that will benefit their communities for generations.

Finally, I would be remiss not to credit this year's amazing response to the cornerstones laid in the years leading to moments like this. Our founders created a local public foundation (which now serves as our region's largest public foundation), not only for the purposes they saw 48 years ago, but for the unforeseen needs they knew would come. When it was time to turn the volunteer organization over to professional management, they had the great intuition to hire Jan Horton, who led the CFO for 15 years from 1988–2003. As we mourned Jan's death in April at the age of 87, we were reminded once again of the broad shoulders on which we stand. She was an optimist, like the founders, like our affiliate leaders, like donors leaving legacies to support people they'll never know. We thank them all and recognize that we remain responsible to all of them to continue fulfilling their expectations that brighter days will always be ahead.

◀ Jan Horton, the first president of the CFO and a longtime community champion, died in April at the age of 87.



Rhonda Christopher

—RHONDA CHRISTOPHER
FY21 BOARD CHAIR

Thank you to outgoing directors

The CFO expresses its appreciation to the outgoing Directors who completed their board service as of June 30, 2021. We are grateful for all of the volunteers who share their time and expertise to help the CFO reflect the region it serves.

Jim Holt, a retired educator and longtime affiliate leader, is completing his second term, which includes serving as Board Treasurer and member of the Executive Committee. Holt, who now lives in Nixa, served on the Table Rock Lake Community Foundation board and as a leader of the Reeds Spring Education Foundation. He received the CFO's inaugural Arthur Mallory Award for outstanding service in rural education philanthropy.

Jeff Layman, Chief Investment Officer at BKD Wealth Advisors, is completing service as Chair of the Investment Advisory Board and member of the CFO's Executive Committee. Under Layman's leadership, the IAB shifted to the Outsourced Chief Investment Officer model to guide its growing investment portfolio and created a new ESG investment option.

Jeff Schrag, owner of The Daily Events and Mother's Brewing Co.,

served for two terms, including as Board Chair in FY17 and member of the Executive Committee for several years. He also continues to serve on the Mission Related Investment Committee.

New Board Members

Three new members are joining the CFO Board of Directors for the FY22, beginning on July 1. CFO Directors are eligible to serve up to two three-year terms. The 21 members represent the CFO's 58-county service region.

Roy Hardy Jr., Nixa, is a former scholarship recipient who now serves on the CFO's Scholarship Committee. He is an Associate Power Marketer at Associated Electric Co.

Jimmy Liles, Nixa, is the City Administrator in Nixa and previously served as Chief of Police. He also serves on the board of the Nixa Community Foundation, the CFO's first affiliate created in 1993.

Gail Smart, Springfield, is an attorney and CFO donor advisor with her husband, Clif. She also serves on The Northwest Project grantmaking committee and was a member of the ad hoc Philanthropic Leadership Committee.



Jim Holt



Jeff Layman



Jeff Schrag

FY22 EXECUTIVE COMMITTEE

- **Chair:** Robin Morgan, West Plains (VALIC Financial Advisors)
- **Vice chair:** Laurie Edmondson, Springfield (Drury University)
- **Treasurer:** Dean Thompson, Republic (Springfield City Utilities)
- **Secretary:** Anne E. McGregor, Branson (The Neighbor Company)
- **At-large:** Emily Kembell, Springfield (Kirkland, Woods & Martinsen LLP)
- **At-large:** Ron Kraettli, Hermann (Retired banker)
- **Investment Advisory Board Chair:** Kari Creighton, Springfield (financial professional)
- **Chair Emeritus:** Rhonda Christopher, Springfield (BKD Wealth Advisors)

Board approves FY22 goals

The CFO Board of Directors approved the following Action Plan for FY22, beginning July 1, 2021.

Determine facility/building options for future growth and needs

To accommodate future growth, staff and board will consider further expansion at the CFO's current location or potential re-location in coming years.

Implement plan for nonprofit services entity, if feasible

Staff and board will use recommendations of a feasibility study completed in June to guide the CFO's potential role as a catalyst and/or funder of a nonprofit services entity.

Expand Diversity, Equity and Inclusion effort to entire organization

Expand implementation of the "Inclusive Excellence" model adopted in FY21 to board training, bylaws and policies review and potential revisions.

Review Bylaws for updates, revisions, and alignment with DEI work

Undertake a thorough review and update of CFO Bylaws, particularly in areas related to DEI work, cybersecurity and foundation growth.

Review and develop new process for public policy advocacy

Develop process for board consideration and approval of CFO response to high-profile public issues outside of current guidelines focused on field-related topics such as tax changes and donor-advised fund issues.

Develop plan for Next Generation donor attraction and retention

Research strategies and best practices to create plan to engage and cultivate "next-gen" donors moving into prime giving years.

Tax-law changes encourage giving during pandemic

To boost charitable giving to nonprofit agencies during the COVID-19 pandemic, temporary tax-law changes were included in stimulus and recovery bills passed in the last year.

In all of these examples, the additional benefits do not apply to gifts into donor-advised funds. Gifts must be made directly to a 501(c)3 agency or organization with similar public tax-exempt status, or to other charitable funds held at the Community Foundation of the Ozarks, including unrestricted grantmaking, designated, field-of-interest and scholarship funds.

These examples are provided as informational starting points—as always, please consult with your tax and legal advisors for advice.

'Above-the-line' deductions

Individuals can make a \$300 cash charitable contribution and joint tax filers can make a \$600 cash charitable contribution "above the line" in 2021. This means if you take the standard deduction, you still get the benefit! Contributions can be made via cash or check.



Cash in for charity

Cash gifts to charity are more deductible in 2021. Most years, cash gifts to charity are limited to 60% of a donor's adjustment gross income (AGI). Now gifts to charity can apply up to 100% of AGI in 2020 and 2021. Gifts must be made by cash or check and the donor has to choose to use the enhanced charitable deduction limit when filing taxes.



Going corporate

Corporations organized as subchapter C can give a corporate cash gift to a public charity and now deduct up to 25% of taxable income in 2020 and 2021 instead of the usual 10% deduction limit for such gifts.



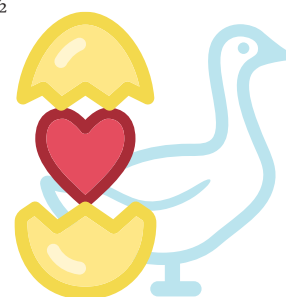
Roll it over

You can still make a qualified charitable distribution (also called the IRA Charitable Rollover) in 2021. If you are 70½, you can give directly from your IRA to the CFO and avoid counting that transfer as income. QCDs may also count toward your IRA's required minimum distribution, and may be up to \$100,000 annually.

IRA distributions don't count as QCDs if the money goes into a donor-advised fund, but there are several other types of funds that do qualify: community grantmaking funds, designated

funds (where a specific charity or charities are selected as beneficiaries), field-of-interest funds (where grants must support a specific area of interest, i.e. arts or environment) or scholarship funds.

Due to the 100% of AGI cash contribution rule for 2021, individuals who are 59½ may see a similar benefit as a QCD if they give a gift from their IRA. As an example: an individual takes a cash distribution from an IRA, contributes cash to a fund at the CFO, and may completely offset the taxes on the distributions by taking a charitable deduction up to 100% of AGI in the 2021 tax year.



NEED EXPERT ADVICE?

While the CFO strives to be your trusted resource for charitable giving, any tax or estate planning is best left to a professional advisor. If you need to speak with an accountant, financial planner or estate attorney, consider a member of our Professional Advisors Council. Find the full list of PAC members at cfozarks.org/professional-advisors. Are you an advisor and want to be included in the PAC? Contact Winter Kinne at wkinne@cfozarks.org.

► The founding board of the Fair Grove Area Community Foundation gather at the historic Womack Mill, the town landmark in northern Greene County.



COVER STORY

New affiliates build on heritage

People, history and location. Those are three common distinctions for essentially all of the CFO's regional affiliate foundations. But the Nevada/Vernon County Community Foundation, the Cabool Community Foundation and the Fair Grove Area Community Foundation will forever be defined by two other characteristics: determination, for raising at least \$30,000, in the midst of a pandemic, for community grantmaking endowments; and entrepreneurial, for making the most of special matching grants during those initial fundraising campaigns.

Alice Wingo, the CFO's vice president of affiliates, credits the CFO's growing relationship with Missouri Foundation for Health for spurring the surge in new affiliate foundations. Over the last few years, the St. Louis-based funder has partnered with the CFO on the Rural Ozarks Health Initiative and COVID-19 response grantmaking.

"MFH wanted to expand its support for the rural communities in our shared service area, and our affiliate network has helped achieve those goals," Wingo said. "After the success of ROHI, these matching grants served as a way to connect with even more communities."

To help the CFO encourage the creation of new affiliates, MFH pledged to

match the required \$30,000 to establish a community grantmaking endowment and jump-start a new affiliate's grantmaking in the interest of public health. The Ash Grove Area Community Foundation, founded in May 2020, was the first affiliate to take advantage of the matching opportunity. Board members of the Nevada/Vernon County affiliate, which lies outside of MFH's service region, worked with Blue Cross and Blue Shield of Kansas City to provide a matching grant with similar parameters.

"These new affiliates now provide a resource for local donors to make charitable gifts of all types and sizes, but also attract philanthropic dollars from outside funders," Wingo said. "Those are two of the greatest benefits that an affiliate can bring to its community."

Westward expansion

Last October, in a bustling town near the border with Kansas, where the hills of the Ozarks ease into the prairie, the founding board of the Nevada/Vernon County Community Foundation accomplished what others could not. "This wasn't the first time someone tried to establish a local community foundation," said Greg Hoffman, NVCCF's founding board president.

As a recently retired financial advisor,

Hoffman wanted to encourage local philanthropy but wasn't sure what that would entail until he was approached by Kelly Ast of the West Central Missouri Community Action Agency. "She told me we needed a community foundation here in Nevada and I thought, 'yeah, that sounds perfect for me.'"

The two made a list of "Who's Who in Nevada-Vernon County" that they wanted to see on the board. "We have an all-star team on the board. That's offered immediate credibility in the community," Hoffman said.

Ast now serves as the vice president for the NVCCF board. She acknowledges it might come as surprise to take on the

▼ Greg Hoffman, the founding board president of the Nevada/Vernon County Community Foundation, leads fellow board members in a discussion of the affiliate's first grant presentation, held in June.





◀ The Cabool Community Foundation's first grants back to the community came just four months after its founding, through the affiliate's participation in the Coover Regional Recovery Grant Program. CCF Board Chair Kirby Holmes, right, presented a \$2,000 grant to Brenda Taylor and Tim Shryack of Missouri Ozarks Community Health. Taylor also serves on the CCF board.

challenge of fundraising for an endowment in the middle of a pandemic.

"We had a focus locally that we have to take care of our own," she said. "While Nevada tends to be the anchor, there are several county schools. In June, when we made our first grants, it was a countywide approach."

Already giving back

In the historic heart of the Ozarks' dairy country, Cabool is nestled along the old junction of U.S. Highways 60 and 63. While the Dairy Farmers of America facility on the south edge of town still drives much of the local commerce,

Highway 60 was rerouted years ago to skirt along Cabool's southern edge, making it easy to bypass the town.

"After World War II, Cabool's location at 60 and 63 helped attract industry to the area," said Kirby Holmes, founding president of the Cabool Community Foundation. "We wanted to ensure we continued on as a thriving community, to maintain our history and sense of community moving forward."

The CCF may be new, but the town is no stranger to rural philanthropy. While neighboring communities of Mountain Grove, Houston and Willow Springs are all supported by affiliate foundations, several members of the Cabool Community Foundation board cut their philanthropic teeth at the Cabool Education Foundation. Established in 2018 as member of the CFO's Rural Schools Partnership, the CEF has already granted nearly \$70,000 to support facility improvements, teacher grants and scholarships for the Cabool R-IV School District. The CEF's funds are now held under the umbrella of the CCF.

After completing the initial fundraising for its community grantmaking endowment in December 2020, the CCF distributed its first grants to six agencies—thanks to the Coover Regional Recovery Grant Program—just four months later. "We got the money out quickly—not only to help our nonprofits through a challenging time," said Kirby, "but so our community could see the foundation in action."

Crossroads of history and future

From its vantage point in north-eastern Greene County, the Fair Grove community has watched the Springfield metro area grow primarily to the west and south. Lisa Bernet, founding president of the Fair Grove Area Community Foundation, considers the town something of a well-kept secret, retaining its small-town charm with the handsome Wommack Mill as its focal point.

"The city is only two square miles, but our school district and fire district cover four counties," said Bernet, who sees prime opportunity to leverage local

philanthropy for both donors and nonprofits in the area. The FGACF completed initial fundraising for its community grantmaking endowment in April.

Through her work with the Foundation of Fair Grove Public Schools, Bernet saw the advantage of affiliating with the CFO. "To me, it's like a restaurant—the CFO runs the back of the house," Bernet said, referring to the back-office support provided by the CFO to school partners, agency partners and affiliate foundations. "I like being out talking to the customers but I don't want to necessarily make the food!"

While the school foundation helped warm the community up to the idea of philanthropy, "there are other kinds of giving, support for other nonprofits, that we'll be able to speak on broader terms through the community foundation," Bernet said. "We'll be able to be the constant resource to make endowed gifts or create designated funds."

Bernet echoed the sentiments of other new affiliate presidents in having the right members of the community on the founding board. "The agricultural heritage of this community is really important, and if you don't acknowledge or represent it in your plans, it's just not going to fly." To guarantee that agricultural perspective, Bernet recruited Matt Crutcher to the board. "He's our Future Farmers of America teacher and has been here for so many years that his students are now adults and have farms of their own."

With the business of establishing the FGACF out of the way, its board is now focused on supporting the collective vision for the community. Bernet notes that both the City of Fair Grove and the school district already have visioning plans in place. Taking the next steps, with the beneficial presence of an affiliate foundation, will be crucial.

"How do you become the best bedroom community out there and maintain that heritage?" Bernet ponders. "That's kind of the trick for our community for where we go—the place where people really want to live and raise their kids."

—by Aaron Scott

BLUEPRINTS FOR SUCCESS

As part of the FY21 action plan, the CFO's Board of Directors charged staff and the board's Regional Committee with developing a set of best practices for regional affiliate foundations. The group decided on three primary objectives that define successful affiliate foundations:

- ▶ **How to establish a new CFO affiliate foundation**
- ▶ **How to create a strong board and board succession plan**
- ▶ **How to operate an impactful grant program**

"Sharing best practices is an excellent way to improve the performance and productivity of an affiliate foundation, helping fill in gaps of knowledge, improve efficiency, encourage leadership and more," said Alice Wingo, the CFO's vice president of affiliates. "We are pleased to offer toolkits to assist affiliate leaders in our current network, as well as those who see the difference that an affiliate foundation can make in their community."

For more information, contact Alice Wingo at awingo@cfozarks.org.



PHOTO COURTESY OF FINLEY FARMS

Placemaking Through Philanthropy

WITH CHARITABLE RESOURCES THROUGH THE FINLEY RIVER COMMUNITY FOUNDATION, THE CITY OF OZARK BUILDS ON ITS SMALL-TOWN CHARM

▲ Beginning in 2010, Kris Dyer led the community effort to save the Riverside Bridge, which was recently relocated by the old Ozark Mill in the Finley Farms development.

Nestled along the Finley River in Christian County, the small town of Ozark features a quaint revitalized central square where boutique shops and restaurants attract residents and visitors. With local enthusiasm for its growing trail system, historic renovations, a hidden spring garden and the Finley Farms development, the attraction is sure to grow.

“It’s evident we have people in our community that want this to be a better place,” says Gerald Chambers, board president of the Finley River Community Foundation, one of 53 regional affiliate foundations of the Community Foundation of the Ozarks.

When it comes to placemaking efforts, CFO President Brian Fogle believes Ozark has reached a tipping point. “We get enough momentum that

it shifts. I think that’s what has happened in Ozark. It started with some dedicated folks that started a main street program there 25 years ago to develop those buildings on the square, and it kept building outside of that.”

The CFO manages funds established to support many of those projects, and having an affiliate foundation in Ozark has made a difference to the community, Chambers says. “Some of those projects may be more county-oriented, but to us it’s all the same. It’s still Ozark and we are the county seat. I believe we have a lot of giving and caring people that support all those types of things.”

Ozark’s secret garden

One of those caring people is Elise Crain, a town historian who is passionate about preserving Garrison Spring



▲ Elise Crain, a Finley River Community Foundation board member, is part of a community effort to care for Garrison Spring.

PHOTOS BY SONY HOCKLANDER

▲ *Garrison Spring Gardens and Park was recently acquired by the City of Ozark and will be supported by the Friends of the Garrison Spring Project Fund, held with the Finley River Community Foundation and the CFO.*

Gardens and Park, a serene, nearly 10-acre green space with an abundance of songbirds, a cave and a rambling creek fed by three pretty springs. Named for the Garrison family who originally owned the land, it's tucked like a secret garden into the urban landscape. It's been the backdrop for photos, a lunch spot for ladies and a place to find peace. "I don't think anyone intentionally kept it a secret," says Crain of the local green space. "It's just one of those things that's always been there."

Until recently, the land was privately owned by the Ernest and Mary Lou Braswell Trust. When Mary Lou Braswell suggested the city buy the property for public use, city officials found a way. At the end of 2020, two grants helped to acquire the property, says Deputy City Administrator Samantha Payne. One came from the Missouri Department of Conservation; the other from the U.S. Department of Agriculture Forest Service Community Forest Program.

But grants only go so far and public funding is limited. That's where the Friends of the Garrison Spring Project Fund comes in. Recently established with the CFO and the FRCF, the fund can help with amenities like adding

a gate, fixing bridges, building trails and more. Payne says that help is vital: "Without those private donations, it would take us a while to get it open for the public to enjoy." The philanthropic support is also a way to generate enthusiasm for the park. "Hopefully with partnerships, we'll be able to turn it into something really beautiful that a lot of people can enjoy," Payne says.

Making the connection

In 2018, the historic Riverside Bridge, more than 100 years old, was awarded to the Morris family for Finley Farms by a selection committee made up of the State Historic Preservation Offices, Ozarks Special County Roads District and Christian County. "The Morris family is incredibly passionate about history and preservation and the natural beauty of the area," says Dayle Duggins, Finley Farms marketing manager. "They thought that this would be a great way to create an enhanced outdoor recreation opportunity in the Ozarks. And also a way to keep this bridge as part of Ozark's rich history."

It wouldn't have happened without local resident Kris Dyer, applauded at a March bridge-raising event for leading

the charge. When Dyer learned in 2010 the flood-damaged bridge would be torn down, "my heart just broke because I love local history," she recalls. Dyer started a Facebook page and began hearing from news outlets. With advice from the Missouri Alliance for Historic Preservation, she applied to make the bridge eligible for the National Historic Register, which blocked destruction. Meanwhile she worked steadily to generate public support through a project fund established with the CFO and the FRCF that helped her with fundraisers and supplies to keep her cause active. That fund was integral to her team's effort, Dyer says: "It was easy to sign up and I didn't have to form my own nonprofit."

Dyer is thankful the bridge will be renovated as part of Finley Farms. There it will act as a pedestrian footbridge between the Ozark Mill and a wedding chapel when not in use for private events, Duggins says. Eventually it will become part of a larger trail system that connects to the Chadwick Flyer trail, another passion project in the works.

Rail to trail

If local trail and rail enthusiasts



◀ Ozark's Impact 100 giving circle supported renovations to the iconic gazebo.



▲ Abbye Torgerson-Bobbett serves on the Ozark Historic River District board. She recently led a brick-paver fundraiser that brought in more than \$10,000 for the gazebo renovation.

have their way, the eight-mile Chadwick Flyer rail bed will find new purpose as a bike and walking trail that connects Springfield to Ozark. A project of Ozark Greenways, the effort has picked up steam, according to Executive Director Mary Kromrey. That's why the Chadwick Flyer and James River Greenways Trail Fund was established through the CFO with a designated gift. A special fund allows enthusiasts to designate gifts and generates more interest, Kromrey says. That's especially important when a project will take several years to complete, she adds.

Proposed by a small group in 2016, the idea gained momentum and energy

grew between the two communities, Kromrey says. Running from Lake Springfield to Ozark, the trail will connect to the Finley River Trail and continue from there to other placemaking attractions including Finley Farms and the Ozark Mill, the last place the old rail line serviced. Enthusiasm for the trail is high, Kromrey says: "It's just got a life of its own."

City centerpiece

Users of the future Chadwick Flyer trail will easily connect to the Ozark Square. Efforts to revitalize the downtown area include renovating its historic centerpiece gazebo. Abbye Torgerson-Bobbett of Torgerson Design Partners is vice president of the Ozark Historic River District board. She says renovation wouldn't be possible without a \$30,000 grant the board received from Ozark Impact 100, a giving circle fund held at the CFO and the FRCF. In addition to restoring and expanding the gazebo, the board plans to add Wi-Fi via the Christian County Library and audio-visual equipment to make events possible.

While the grant will cover construction, the HRD in mid-March launched

a campaign to fund the A/V equipment, furniture and landscaping, Torgerson-Bobbett says. Using the CFO's online giving platform, community members could donate \$100 through the end of June for a personalized brick paver on the west-side patio. It's a way to leave their mark and support the placemaking effort.

"Businesses are doing it, families are doing it—some are doing it in loving memory of people who have died," she says. More than \$10,000 was raised through online and direct donations.

Torgerson-Bobbett is excited about the placemaking projects she sees happening around Ozark.

"It makes me so excited about our community because we look for a place that has the energy where you can live, work and play – where you don't have to go to Springfield or Branson to get amenities like this," she says. "And I think it brings a lot of visitors here and improves our economy as far as tourism goes. It all goes hand in hand when talking about making Ozark a better place."

—by Sony Hocklander

◀ The planned Chadwick Flyer trail will run from Lake Springfield to the Ozark Community Center. A nearly one-mile section is already complete.





Joy Beamer



Robin Morgan



Betsy Curtis



Tyler Gunlock



Sarah Honeycutt



Danny Lambeth



John Ryan

Affiliate leaders celebrated for passion, dedication

AN AFFILIATE FOUNDATION CAN BE fundamental to the vibrancy of a community or region. But in order to effectively improve its community, a foundation must be led by an active and passionate board. To recognize excellence in leadership of its regional affiliate foundations, the Community Foundation of the Ozarks presented awards to seven individuals during a spring meeting of affiliates on May 13.

Stanley Ball Leadership Award

Joy Beamer, president of the Dallas County Community Foundation, was lauded for her dedication and service to Dallas County. After stepping up to lead the board in the middle of a term, she quickly organized its members, engaged them with educational opportunities and recruited an advisory committee. Prior to serving as DCCF president, she founded the Dallas County DIVAS, a “giving circle” that allows professional women in the community to learn about and give back to organizations that are meaningful to them.

“As her fellow board members tell us, Joy Beamer certainly lives up to her name,” CFO President Brian Fogle said.

The Stanley Ball Leadership Award is presented by the CFO and Central Trust Company, which manages the Stanley & Elaine Ball Foundation. It includes a \$2,000 cash award for the DCCF.

Fred Lemons Award

For the past 11 years, **Robin Morgan** has served on the board of the CF of WP in a number of capacities. During that time, the CF of WP has distributed nearly \$2 million in community grants and scholarships. More recently, she helped launch the successful Rib Sale to raise funds for community grantmaking.

Morgan first became active with the CF of WP while serving as director of the Ozarks Medical Center Foundation where she launched the annual Blue Jean Ball, the highest-grossing fundraising event in West Plains. After briefly retiring in 2012, she now works as a financial advisor for VALIC Financial Services. Morgan currently serves as Chair of the CFO’s Board of Directors and is a member of several committees.

“Robin exemplifies the qualities that distinguished Fred’s community leadership,” said Fogle. “We are grateful to benefit from her experience on both the affiliate board and as

a member of the CFO’s executive leadership.”

The Fred Lemons Award is named for the late president of the Lockwood Community Foundation, who demonstrated remarkable leadership during his 15-year tenure until his death in 2014. The award includes a \$1,000 unrestricted grant to the CF of WP.

Board Members of Excellence

- **Betsy Curtis**, Nevada/Vernon County Community Foundation: “Betsy is always willing to do the extra work,” said NVCCF Board President Greg Hoffman. “She’s the first to step up to volunteer and does anything she can do to help make our foundation successful.”
- **Tyler Gunlock**, Ash Grove Area Community Foundation: Gunlock was instrumental in establishing the AGACF as the CFO’s 50th regional affiliate foundation, leading a wave of new communities starting affiliate foundations in the past year. He is credited with helping the AGACF secure a \$10,000 Coover Regional Recovery Grant that was recently redistributed to agencies serving Ash Grove.
- **Sarah Honeycutt**, Cabool Community Foundation: “Sarah was the key fundraiser in the drive for Cabool to become a CFO affiliate,” said CCF Board President Kirby Holmes. “She is a tireless worker with excellent computer skills and a publicity expert—all in all, an excellent board member.”
- **Danny Lambeth**, Carthage Community Foundation: “After his term as board president ended, Danny didn’t slink off into the night, but instead took on the role of the GRO Carthage chairman,” said Heather Collier, CCF foundation manager. “Danny has worked tirelessly to advance economic development and coordinate nonprofit services throughout Carthage.”
- **John Ryan**, Cape Area Community Foundation: “No matter what the task, John is always willing and able to help,” said CACF Board President Skip Smallwood. “I know he stays very busy with his legal practice, but always takes time for our community foundation.”

PASSING THE GAVEL

Several CFO affiliates changed leadership between fall 2020 and the end of the 2021 fiscal year. We appreciate the efforts of these past presidents and wish the new leaders much success in building these foundations’ roles in community betterment.



Cape Area Community Foundation

Outgoing: Stan Irwin
Incoming: Glenn (Skip) Smallwood



Joplin Regional Community Foundation

Outgoing: Gary Duncan
Incoming: Chuck Brown



Nixa Community Foundation

Outgoing: Chris Thomas
Incoming: Sharon Whitehill

Republic Community Foundation

Outgoing: Chris Replogle
Incoming: Josh Troester

Willard Children’s Charitable Foundation

Outgoing: Amanda Brown
Incoming: Wesley Burrell



◀ KY3's Steve Grant speaks with Legacy Bank and Trust's Jeremy Loftin during the 3 p.m. livestream for Give Ozarks Day: Rally for Recovery at the Creamery Arts Center in Springfield. Throughout the day, livestreams announced prize winners, showcased performing-arts agencies and recognized sponsors.



▲ Caitlin Golike, the CFO's Director of Donor Services, helped tally donations each hour in order to randomly select the 12 "Luck of the Draw" winners.

Online gifts tally during call to rally

After an exciting 12 hours of generosity that culminated with a mad dash to the finish line, Give Ozarks Day: Rally for Recovery posted a final "Rally Tally" of \$718,728. Nearly a thousand donations were made during the final hour, the highest volume of gifts for the day, as donors raced to help their favorite nonprofits claim the last \$5,000 "Luck of the Draw" hourly prize.

The regionwide giving day event, presented by the Community Foundation of the Ozarks and Bass Pro Shops, was held March 24, a year after the COVID-19 pandemic first spread across the region. In the months that followed, the nonprofit community faced myriad challenges, from cancelled fundraising events to a spike in demand for services from people in need. Give Ozarks Day: Rally for Recovery gave 157 of the CFO's nonprofit partners an opportunity to raise much-needed funds for operations and other projects.

The event was hosted on CauseMomentum.org, the CFO's crowdfunding platform available exclusive to agency partners. The site was developed several years ago by Mostly Serious, a full-service digital agency in Springfield, which made necessary updates in the months prior to accommodate a large-scale giving day event.

Social media in southwest Missouri was buzzing about Give Ozarks throughout the day.

Livestreams of the CFO's hourly prize announcements, produced with help from Plotline Productions, the Ozarks Performing Arts League and media sponsors KY3/KSPR, were viewed thousands of times on Facebook. #GiveOzarks even trended on Twitter in Missouri throughout the day.

"The generosity of our community never ceases to amaze us," said Brian Fogle, president and CEO of the CFO. "This incredible outpouring of support shows how much our region's residents value the services nonprofits provide in their communities. With the average donation size of about \$71, it also shows that everyone can participate in philanthropy and every gift matters."

With contributions from event sponsors, Give Ozarks Day: Rally for Recovery featured \$60,000 in hourly "Luck of the Draw" prizes, chosen at random with additional chances from the number unique donor that supported an agency during each hour.

Included in the final tally are prizes from Carthage Community Foundation, the Joplin Regional Community Foundation and the Community Foundation of the Lake, which held local events in conjunction with Give Ozarks Day. Agency partners in Carthage also received generous support from the Marsh Family Foundation.

—by Aaron Scott

GIVE OZARKS DAY: RALLY FOR RECOVERY FACTS & FIGURES

\$718,728	9,187
Final "Rally Tally"	Total online gifts
4,694	\$54,011
Estimated unique donors	Hourly average for online gifts

- Presented by: Bass Pro Shops and the Community Foundation of the Ozarks
- Sponsored by: Burrell Behavioral Health, Central Bank and Central Trust, Coover Charitable Foundation and Commerce Trust Company, Darr Family Foundation, Great Southern Bank, Guaranty Bank, Hatch Foundation, Legacy Bank and Trust, Ollis/Akers/Arney and SFC Bank
- Media sponsors: KY3/KSPR and Springfield Business Journal

Never Too Young

COUPLE'S BACKGROUNDS INSPIRE THEIR PLANNED GIFT

Jody and Chuck Dow, a young professional couple with a winsome blue-eyed one-year-old son, will celebrate their third wedding anniversary in September. Their mutual passion for community philanthropy not only brought them together in 2017, it inspired the couple to leave a financial legacy for nonprofits they love.

"We are both very deeply connected to the organizations we work and serve at, and there are other nonprofits we feel passionate about as well," says Jody Dow, executive director of the Springfield Dream Center, a community services hub founded by North Point Church in Springfield's Woodland Heights neighborhood.

"Even if we're not here," adds Chuck, a financial advisor and managing director at Synergy Wealth Solutions, "we want our legacy to be able to continue to support those causes."

After marrying, they discussed how to ensure their story of giving back would continue after they're gone. They knew it was time to act once they were expecting their son, Jude. With attorney Danielle Kincaid of The Elder Law Group, the Dows updated their estate to take care of Jude and other family members. In addition, they directed a portion of their revocable living trust to go into the Dow Family Fund, a designated fund they established with the Community Foundation of the Ozarks. One day it will provide perpetual support to three nonprofits: the Springfield Dream Center, Borrow My Angel and North Point Church.

The main benefit to establishing a fund through the CFO, Kincaid says,

is flexibility. As people age, their passion for charities might change or grow. "They will only have to go to the CFO—to notify the CFO—that they want changes in their charities," Kincaid says, "instead of coming to me and having to do an amendment to the trust."

History of philanthropy

That the Dows want to extend philanthropy beyond their own lives is no surprise. Each has a history of helping others. In fact, Jody has wanted to serve and give people hope since hearing from missionaries as a child. "I just remember I was 11 and telling my mom that I really wanted to do that for the United States," recalls Jody, who grew up in Harrisonville near Kansas City. "I want people around me to know there's hope and they can still have big dreams."

While attending Missouri State University, Jody began volunteering at North Point in student ministry and was hired near the end of her senior year. After shifting to a position in community outreach, she discussed with the church pastor how to implement the Good Samaritan story in which the Samaritan extends more help and hope. That's the model for the Springfield Dream Center, which opened in March 2017. "It's been incredible work," Jody says. "All around, we're seeing real stability in families that, when we first met them, came to us lacking a dream, a vision for their life."

Born at Fort Leonard Wood to a military family, Chuck lived in a variety of places before moving to Springfield as a teen. He attended MSU then moved east to pursue a career in the travel industry. He returned to Springfield in 2013, changed his career to finance and began attending the North Point

campus in Nixa, serving in its music ministry. Inspired by his sister's lifelong struggle with mental illness, attempts at suicide and ultimate death, he also worked to establish Borrow My Angel, named after a song he'd written. The nonprofit, still in its infant stage Chuck says, will focus on suicide prevention and mental-health awareness.

That effort played a role in the couple meeting. They still laugh about their first date, just three months after the Dream Center opened. Mutual friends had tried to connect them, but Chuck

"I want people around me to know there's hope and they can still have big dreams."

—JODY DOW





PHOTO BY SONY HOCKLANDER

balked at blind dates and Jody was oblivious to the efforts. Instead, Chuck decided to volunteer at the Dream Center. “Once we started talking, I asked her out on a date—only she didn’t realize it,” Chuck says. “She thought when I first asked her out that I just wanted to talk about advice for how to start a nonprofit.”

A family that serves

Establishing an agency capacity fund for the Dream Center and learning about grant opportunities has been

a game-changer, Jody says: “The CFO is a phenomenal resource for the community, and it’s been an incredible outlet and partner for us.” The CFO also helped Chuck establish an agency capacity fund for Borrow My Angel.

When it came time to update their estate, the Dows knew the CFO could serve them also as a family. Winter Kinne, the CFO’s vice president of development, says given their ages, the couple will likely be around for a long time. But someday, when they aren’t, their designated fund will be endowed

through their estate, “meaning that the corpus is going to stay intact, and then a certain percentage is going to basically become a sustainable source of income for those three charities.” It’s a misconception, Kinne adds, that you must be old or a “gazillionaire” to leave something for your community.

The Dows are neither of those. “Our family values are very much about giving back to the community that we live in,” Jody says, “and the CFO made it easy for us.”

—by Sony Hocklander

▲ Chuck and Jody Dow with son, Jude, at the Dream Center, which provides both practical services and hope to families in its Woodland Heights neighborhood.



▲ The Watershed Center at Valley Water Mill Park in northeastern Greene County provided a beautiful backdrop for the CFO's first in-person event in 2021.

A sustaining gift for sustainable missions

Hosting the CFO's first in-person event since the start of the pandemic was reason enough for celebration on Earth Day 2021. The real reason for the celebration, though, was even more exciting than reaching that milestone.

The date—April 22, the 51st anniversary of Earth Day—was selected to announce that an anonymous donor made a \$4 million gift to establish permanent endowments for four environmental nonprofit organizations that serve Springfield-Greene County and the region.

The recipient agencies are James River Basin Partnership, Ozark Greenways, TrailSpring and Watershed Committee of the Ozarks. These endowments will provide annual income for each organization while maintaining and increasing the principal, or corpus, amount for these organizations forever.

The donor selected the four organizations for these endowments based on the donor's interest in conservation, the outdoors and the importance of our environment to our local quality of life. Each of the organizations is a nonprofit partner with the CFO.

Staff and board members from each



▲ The executive directors of the four agencies supported by the \$4 million endowed gift were on hand for the announcement: Brenton Stock, James River Basin Partnership; Jessica Pearson, TrailSpring; Mike Kromrey, Watershed Committee of the Ozarks; and Mary Kromrey, Ozark Greenways.

organization and the CFO gathered on the beautiful spring day at the Watershed Center to talk about the transformative power the gift will have for the organizations' long-term security. As with many other environmental organizations and resources, these groups underscored their vital roles in the region as outdoor activities surged throughout the year of isolation and shutdowns.

As TrailSpring Executive Director Jessica Pearson put it: "The dirt connects us all."

LEGACY SOCIETY

The following people have made planned giving commitments to benefit the CFO or one of its affiliate foundations from July 1, 2020 through June 30, 2021.

Carthage

Amy and Chad Cole
Steven and Cynthia Head

Crawford County

The Andreasson Family

Finley River

Hollie Estes
Nichole Rucker

Springfield/Regional

James A. and Pamela J. Gessler
Derek Hennigh and Bryan Scanlon
David E. and Cynthia Diane Kesterson
James and Tabitha Golike
Anonymous

Stockton

R. Dwain Hammons

Nixa

Freddie and Melissa Young

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.

Kevin Callahan, Callahan

Law LLC, Springfield

Judy Moore, Flanigan,

Lasley and Moore,
Carthage

Sumer Trip, Simmons

Wealth Management,
Springfield

Bri Warner, Ozarks Elder

Law, Springfield

Ready to Talk?

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

Coover grants support COVID-19 recovery for rural communities

The long-running Coover Regional grantmaking program is well known to nonprofits across central and southern Missouri, typically distributing hundreds of thousands of dollars each year to about 20 agencies and school districts serving rural communities through two competitive grant rounds. But with the COVID-19 pandemic creating unprecedented need across the entire region, the grantmaking tactic took a new approach for 2021.

The partnership between the Louis L. and Julia Dorothy Coover Charitable Foundation, managed by Commerce Trust Company, and the Community Foundation of the Ozarks relied on the CFO's network of regional affiliate foundations to distribute funds through the Coover Regional Recovery Grant Program. Thirty of the CFO's regional

affiliate foundations each received \$10,000 to distribute to designated agencies or through separate grant rounds.

Ultimately, 115 nonprofit agencies, school districts, faith-based organizations and governmental entities received grants for pandemic-related needs. Several affiliate foundations supplemented their \$10,000 with additional funds, bringing the final total for the program to \$311,460.

"One of the benefits of the CFO's affiliate network is the ability of local leaders to make decisions in the best interests of their own communities," said Jill Reynolds, senior vice president at Commerce Trust. "Using leaders across rural Missouri to award Coover Charitable Foundation grant dollars has contributed to this partnership's success in distributing more than \$7 million since 2002."

Rural Recovery Support

These 30 regional affiliate foundations received Coover funds to redistribute for pandemic-related needs in their communities.

- Ash Grove Community Foundation
- Aurora Area Community Foundation
- Barton County Community Foundation
- Bolivar Area Community Foundation
- Bourbon Community Foundation
- Cabool Community Foundation
- Cape Area Community Foundation
- Carthage Community Foundation
- Cassville Community Foundation
- Dallas County Community Foundation
- Douglas County Community Foundation
- El Dorado Springs Community Foundation
- Eldon Community Foundation
- Finley River Community Foundation
- Community Foundation of the Hermann Area Inc.
- Houston Community Foundation
- Joplin Regional Community Foundation
- Community Foundation of the Lake
- Marshfield Area Community Foundation
- Meramec Regional Community Foundation
- Nevada-Vernon County Community Foundation
- Ozark Foothills Regional Community Foundation
- Perry County Community Foundation
- Sarcoxie Community Foundation
- Ste. Genevieve County Community Foundation
- Stockton Community Foundation
- Community Foundation of Taney County
- Truman Lake Community Foundation
- Community Foundation of West Plains Inc.
- Willard Children's Charitable Foundation



**COVID-19
Response &
Recovery Fund**

\$879,158

Additional gifts to the CFO's COVID-19 Response & Recovery Fund after an initial \$1 million commitment by the CFO, Missouri Foundation for Health and the Coover Charitable Foundation



\$2,558,269

Discretionary grants from the CFO's COVID-19 Response & Recovery Fund, regional affiliate foundations and related programs



\$1,064,110

Grants from **donor-advised funds** held by the CFO and its regional affiliate foundations

\$83,481



Grants from **employee benevolence** and field-of-interest funds for COVID-19 response



\$718,728

Funds raised during **Give Ozarks Day: Rally for Recovery** for nonprofit agency partners

The CFO's total philanthropic impact for COVID-19 response and recovery through June 30:

\$4,424,588

Life Beyond the Northwest Project

LARGEST SINGLE GRANT IN THE CFO'S HISTORY WRAPS UP AFTER FIVE YEARS



► *Marsha Hatfield, with her son, Skyler, recently purchased a home just a few blocks away from the Fairbanks. She was able to make the transition from renter to homeowner through the Drew Lewis Foundation's Blue House program.*

AFTER LAUNCHING IN 2016, partners in the Northwest Project recently concluded the pilot phase of their work to counter generational poverty in Springfield and across the Ozarks. The numbers and statistics show the overall impact of the program, but the personal experiences of participants get to the heart of what the NWP worked to accomplish.

"If you're working the program, the program works for you."

Marsha Hatfield is confident she would have achieved her key life goals given enough time. But she credits her participation in the Northwest Project with accelerating her progress.

Since joining one of the first NWP cohorts based at The Fairbanks, Hatfield has earned an office administration certification and is now working to become a peer support specialist with encouragement from her employer, the AIDS Project of the Ozarks. In March, she purchased what she hopes will be a

"forever" home for her and her son, Skyler, in the Grant Beach neighborhood.

"I would have gotten where I was going because I was determined, but I wouldn't be where I am yet," Hatfield says.

Originally from Kansas City, Hatfield, now 53, moved to northwest Springfield in 2006. After a divorce, she and Skyler navigated some challenging times. A work colleague shared a flyer about the NWP and she decided to give it a try. She ended up as her cohort's valedictorian.

She credits the program with improving her budgeting skills to build up her savings, increase her credit score and start planning for retirement. She also appreciated the built-in support system and accountability that helped

her sever toxic relationships in her life.

"It helps a person build self esteem to handle situations that get thrown at you," she says. "You learn tools on how to process things and keep moving forward."

The Drew Lewis Foundation also initiated the Blue House program to purchase neighborhood properties, make renovations and sell to eligible buyers, like Hatfield, who rented the home for two and a half years before buying it. With recent low-interest rates, her house payment is lower than the cost to rent a two-bedroom apartment. She's planted flowers and started a vegetable garden at what she calls her "own little piece of heaven."

"I have a future for my son and he doesn't have to worry about going to

KEY OUTCOMES

- **Bottom line:** 70% of all active households moved above 100 percent of federal poverty guidelines. Seven families moved above the 200 percent mark.
- **Bankability:** For the 464 participants, average monthly income increased by \$568 and average credit scores increased by 48 points, which improved their access to the banking system along with positively affecting mental and physical health. For long-term participants—36 months or more—average monthly income improved by \$798.
- **Transferability:** A key goal of the pilot project was the ability to replicate it on a broader scale. The geographically centered Northwest Project is now RISE—"Reaching

Independence through Stability and Education"—with programs established in multiple Ozarks communities, including Aurora, Salem, Eldon, El Dorado Springs, Hermann, Monett and Neosho.

- **Adversity:** The links between early life challenges and poverty were clear. Incoming participants completed Adverse Childhood Experience (ACE) surveys for childhood traumas like abuse, neglect and maltreatment. While nationally, 16% of adults report four or more adverse experiences, the rate among NWP participants was 60%.
- **Unforeseen consequences:** The COVID-19 pandemic in the NWP's final year affected the program. It inhibited the original goal of

500 participants over the five-year period. Project leaders collected monthly self-sufficiency data that showed significant increases in stress from service-sector job losses, food insecurity and poor mental health.

- **What's next:** NWP/RISE will continue into a 6th year with remaining CFO funds and additional funders. Data research will continue with plans to submit to a peer-reviewed journal. The rural RISE programming continues to evolve. A fee-based social-enterprise model is available for interested communities. For more details, contact project director Dr. Amy Blansit, at amyblansit@missouristate.edu.

ABOUT THE NORTHWEST PROJECT

- **Inspiration:** The 2015 Community Focus Report for Springfield-Greene County cited a spike in the poverty rate as the top Red Flag with the community “unable to sustainably impact chronic poverty issues.” Months of study by an ad hoc Impacting Poverty Commission underscored the long tail of the Great Recession and poverty’s effects on the community as a whole. A Jacksonville, Florida-based model—“1,000 in 1,000”—showed evidence of impact by focusing on “pivotal assets,” basic life functions and skills that, if achieved by individuals or families, increased the likelihood to emerge from poverty over the long term. These assets included areas like reliable transportation, childcare, parenting skills, financial literacy and affordable housing.
- **Grant process:** The CFO sought collaborative proposals to develop a similarly tailored model focused on a concentrated area of poverty in northwest Springfield. In the end, a volunteer grantmaking committee selected a partnership of the Drew Lewis Foundation, Drury University and Missouri State University.
- **Funding:** The CFO provided \$500,000—its largest single grant to date—and developed initial partnerships with the Stanley & Elaine Ball Foundation and the Jeannette L. Musgrave Foundation. Since the 2016 launch, additional funders contributed more than \$850,000 in support. The City of Springfield launched a companion initiative—the Zone 1 Blitz—focused on public improvements like infrastructure and neighborhood safety.
- **For more information:** Visit cfozarks.org/nwp.

a different school. It’s the American Dream of owning your own home and I have that now,” she says.

She acknowledges the challenges of staying with the program long enough to see its impact over time. It may feel slow going at first, and some don’t stick it out, but the participants who keep chipping away should accomplish many of the goals they put on their vision boards at the very beginning.

“I’ve never lived on my own until the last three years and I never thought I’d be able to do it,” she says. “It’s very empowering to know I don’t have to rely on anyone else to make sure my son and I are taken care of.”

“The people who work at Fairbanks just know how to handle people in poverty without making them feel like they’re a failure.”

Monica Swadley isn’t where she wants to be yet—but she’s come so far since 2015 when she left her husband and moved to Springfield for a drug-rehabilitation program after her kids landed in foster care. She and her kids are reunited and they’ve had the stability of going to the same school for the last several years. She rents a nice house and drives a working car.

Still in recovery, Swadley works as an overnight home-health caregiver and holds a second part-time job helping on a recovery team at the Drew Lewis Foundation. And she’s going to school for a criminal justice degree in hopes of becoming a probation, parole or correctional officer. That’s a long way from when she started the NWP, now RISE, in 2017 without a job, just getting by,

with no real goals for her future.

“I don’t like my life being micromanaged,” she acknowledges. “That’s what RISE is. I knew I needed it, but I didn’t like it. It’s all about accountability.”

As an example, she says, she used to spend her tax return as soon as it came in. Now, she uses it to pay her rent for the whole year. “I don’t like it. I would love to blow it. But that’s just a worry I don’t to worry about now.”

She has gained more “social capital,” the ability to make connections and develop a support system. That ranges from having banking relationships to knowing where to go if her car breaks down.

Unfortunately, Swadley is experiencing the “cliff effect,” a term for when people lose government assistance once they start to earn more money, but not enough to fully emerge from poverty. She stopped receiving child support and now earns \$67 a month too much to qualify for food stamps.

“We’re struggling a little bit, but I’ll get it figured out,” she says. “I know places to go if we do need help. I don’t want to use what other people could use more than us.”

Still, she describes herself as hopeful and says her life is full and beautiful; she calls her kids “very kind humans” with whom she shoots straight about staying off drugs and out of debt, keeping busy with school activities and aiming for a good career or trade job.

“I want things to go for the better. I want to be working a job that pays enough money to where I’m not in poverty. I realize that’s going to take time so I’m just kind of rolling with it.”

—by Louise Knauer

◀ Monica Swadley, center, credits her children—Case, Kylie, Thomas and Wyatt Anderson—for motivating her to advance in her recovery, education and career.

PHOTO COURTESY OF ASHLEY NICOLE PHOTOGRAPHY



Enriching All

Newly adapted program promotes community success by valuing and engaging richness of diversity

AS PROGRAM COORDINATOR AT THE CFO, Krista Moncado plays a vital role in grantmaking administration for the Musgrave Foundation. At Community Partnership of the Ozarks, Tyree Davis IV serves in the relatively new role of Community Diversity and Equity Coordinator.

Before the two ever met in person—and despite working in offices only 400 feet apart—Moncado and Davis had already worked together to create a plan for nonprofits to implement diversity and equity practices in the workplace—no easy feat.

Communicating through virtual meetings, phone calls and text messages, Moncado and Davis adapted the Inclusive Excellence model, originally designed for colleges and universities, into a pilot program for nonprofit organizations.

In March, the two were finally able to meet in person for the first time.

Taking shape, taking action

Months earlier, following the murder of George Floyd, the CFO, CPO and United Way of the Ozarks issued a statement expressing each organization's dedication to denounce and

▲ Krista Moncado and Tyree Davis finally met in person in late March after working together virtually for months.

DEI programs kick off 2021–22 grantmaking year

The Community Foundation of the Ozarks is deepening its commitment to Diversity, Equity and Inclusion with the first grant programs of the new fiscal year, dedicating additional unrestricted grantmaking funds for nonprofit agencies that work to uplift members of marginalized identity groups.

Total funds available in the Springfield-Greene County Diversity, Equity and Inclusion Grant Program has increased to \$100,000, with requests capped at \$25,000. The program opened July 1 and will close Oct. 15, with grants announced before the end of the year.

“Ultimately, our goal with this

program isn't to merely bring to light issues that face underserved individuals but to create significant, lasting change to the Springfield community,” said Bridget Dierks, vice president of programs for the CFO.

Last year, the program funded projects for eight nonprofits serving a wide range of people, including Hand in Hand Multicultural Center's work with immigrant families, Springfield Public Schools' professional development program for students with disabilities, and Ujima Language and Literacy's development as an up-and-coming educational program.

“The CFO is proud to support the

work of agencies committed to diversity, equity and inclusion in Springfield and across central and southern Missouri,” Dierks said. “We continue to commit grant dollars to this work because it is vital to the future success of our communities.”

Inclusion across the Ozarks

The Ozarks Inclusive Opportunity Grant Program supports small grant requests to ensure the representation of diverse voices in community conversations, engagement and leadership in local communities across the region, Springfield included. In its second year, funding for the program has increased

work to end systemic racism and discrimination in our community. For several years, the CFO has included diversity and inclusion efforts as part of its annual grantmaking focus, but had not taken concrete steps to examine its own organization for potential shortcomings. As part of its 2020 action plan, the CFO—along with CPO and UWO—would implement a form of the Inclusive Excellence model of diversity, equity and inclusion training for all staff members.

For both Moncado and Davis, striving towards diversity and inclusion has deep personal meaning that helped inform many facets of the program.

“It is important to me because I am a Black man in America. I cannot remove my blackness. In every facet of my life, I am Black. In my professional life, my personal life—there’s no separation of that,” Davis remarked. “Sometimes we think the Civil Rights era was so long ago, and it wasn’t. And I know what it is like to not see people that look like me in positions of power. And I think that this position allows us to get in and preach the importance of this work.”

Training starts with staff teams

As the test subjects for Moncado and Davis’ adaptation of Inclusive Excellence, CFO staff participated in three sessions of interactive diversity and equity training. Topics included identifying implicit biases, systemic racism and understanding issues facing the LGBTQIA+ community.

A significant component of the training focused on setting and working towards both individual and departmental goals to help members of all identities feel welcome and valued. As a result, staff members had “accountability partners” to help each other participate in the difficult discussions surrounding discrimination and how to make strides to be more inclusive

in and out of the workplace.

While the topics surrounding discrimination, implicit biases and racism are uncomfortable for most, Moncado was pleased to see significant productive conversations during the training.

“Our biggest win was several folks commenting they initially were dreading the training, but were surprised at how quickly the time went by,” Moncado says.

“Other feedback I was surprised by was that by intentionally creating a space to discuss uncomfortable topics, the awkwardness was lessened,” she added. “That allowed individuals to focus internally, letting go of worries about how they will be perceived by others, reaching the root of why and how they navigate the world in the way they do.”

CFO President and CEO Brian Fogle also found the training to be insightful, and appreciated the opportunity to contemplate opportunities for improvement within the CFO.

“Self-reflection is certainly part of our internal work on diversity, equity and inclusion,” Fogle said. “We bring our learned and lived experiences to all issues, and may not have the right toolkit for addressing other’s questions, too, about issues surrounding DEI work. The Inclusive Excellence model provides that framework.”

Moncado’s and Davis’ Inclusive Excellence adaptation for nonprofits is now ready to be implemented at the CFO’s nonprofit agencies partners across the region.

—by Olive Thompson

“By intentionally creating a space to discuss uncomfortable topics, the awkwardness was lessened. That allowed individuals to focus internally.”

—KRISTA MONCADO

to \$30,000, with requests now capped at \$2,000.

Last year, the program supported 19 agencies and projects in communities across the region, including the Joplin Regional Black Expo, the LGBTQ+ Pride Picnic in Sedalia, the Arc of the Ozarks’ workshop on diversity inclusion in employment, and Refugee and Immigrant Services and Education’s effort to train interpreters in the Noel area.

“Our mission is to enhance the quality of life for everyone in our region, and that’s accomplished by making this place we call home more welcoming for all people,” said Brian Fogle, CFO President and CEO. “We’re so glad for the new opportunities these grants provide for these organizations that share those values. We look forward to seeing the unique projects that this program will support in the coming months.”

The program is open throughout the year, with grants awarded on a rolling

basis as funds remain available. Donations to the CFO’s Diversity, Equity and Inclusion Fund will further this grantmaking and can be made at cfozarks.org/diversityfund.

Beyond grantmaking

In addition to rolling out the adapted Inclusive Excellence model to nonprofit agency partners, the CFO will continue to provide support for the Community Diversity and Equity Director at the Community Partnership of the Ozarks. Tyree Davis IV, featured in the story above, was hired last year to coordinate with DEI professionals at other Springfield institutions in an effort to break down structural barriers and develop a culture of equity and inclusion in the community.

Originally from Kansas City, Davis first came to Springfield as a student at Missouri State University, earning bachelor’s degrees in communications and

business administration and a master’s degree in health care administration. He and Krista Moncado, also featured above, now hold certificates in diversity, equity and inclusion training.

DEEP DIVE ON GRANTS

The CFO will host a professional development opportunity for agency partner representatives at 10 a.m. on Thursday, Aug. 26. The workshop will cover the CFO’s upcoming grant programs and offer a detailed look at other grantwriting resources. For more details, contact Holly Beadle, Director of Philanthropic Services, at hbeadle@cfozarks.org.

A Final Word

A NOTE FROM CFO PRESIDENT BRIAN FOGLE

"It was the best of times, it was the worst of times, it was the age of wisdom, it was the age of foolishness, it was the epoch of belief, it was the epoch of incredulity, it was the season of light, it was the season of darkness, it was the spring of hope, it was the winter of despair."
—Charles Dickens, *A Tale of Two Cities*

"Hey, give me a break—it's my first pandemic!"
—A personal friend of Brian

Much will be written about these past 16 months or so, and all that we've been through. The words Dickens wrote over 160 years ago seem to capture these times as well as anything I've seen offered contemporaneously—on par with, perhaps, the words of my friend. I do wonder how we will fare in the clarity that comes with history. Only time will tell.

As my staff has grown tired of hearing from me, I've often referenced an article from the spring of 2020 that quoted psychologist and Behavioral Economics contributor Daniel Kahneman who said people who weather a crisis better have a "well-calibrated sense of future regret." That is, they have the ability to project themselves into the future, and look back, and ask "what is it I wish I would have done or not done."

The avoidance of "future regret" has driven us since we first learned the coronavirus was in our midst in March 2020. With the gift of reflection, I can look back on the Community Foundation of the Ozarks' response to this historical event with a sense of pride, accomplishment, and fulfillment.

As a "recovering banker," I tend to be drawn to numbers. Pardon me for my recidivism once more:

- ▶ We set historical records in gifts and contributions of \$73 million, and grants and distributions of \$54 million this past fiscal year;
- ▶ We facilitated 41 separate grant rounds last year, compared to 19 two years prior;
- ▶ We opened our COVID-19 fund on March 15, 2020, and had raised \$1 million by the 19th. We made our first COVID-19 grants on April 1, and have since made COVID-related grants nearing \$5 million; and
- ▶ We hosted Give Ozarks: Rally for Recovery, which raised nearly \$720,000 online in 12 hours for 157 of our nonprofit partners.

Each of those numbers required actions, such as:

- ▶ Our board courageously used operating reserves for additional grantmaking dollars. As one board member put it, "these are rainy day funds, and we're facing a deluge";
- ▶ Along with our "Philanthropy Row" partners, United Way of the Ozarks and Community Partnership of the Ozarks, we helped organize the Have Faith Initiative, which coordinated COVID-19 response activities of over 70 churches;
- ▶ We published "First Response," a report capturing the early days of the pandemic in Springfield-Greene County



through interviews with 26 local leaders;

- ▶ We learned early one August morning that Springfield Public Schools was starting the fall semester of 2020 virtually. By that afternoon, our staff had devised and launched a new grant round to help nonprofit organizations create "learning pods" for children to learn virtually, letting their parents continue to work;
- ▶ We helped volunteer leaders establish regional affiliate foundations in four rural communities;
- ▶ To assist our hard-hit arts organizations, we offered low-interest Program Related Investments; and
- ▶ We helped connect five critical nonprofits with paid temporary workers to help meet their needs as the volunteer pool dried up due to health concerns.

This past year has certainly been the worst of times, filled with sadness, loss and bitterness. It also brought out the best in courageous leaders, dedicated health-care workers, fearless teachers and passionate nonprofit leaders who stared the coronavirus in the face without flinching.

Through all we've been through, there remains hope for a brighter tomorrow, and for me, no regrets on how our board, staff and donors here at the Community Foundation of the Ozarks responded to the biggest challenge of our lifetime. In the midst of the darkness, there remains a light.

Brian Fogle



2021 DONOR EDUCATION SERIES

Philanthropy & Workforce Development

In less than a year, one of the biggest challenges has flipped from high unemployment to a worker shortage. In July, the national figure for job openings stood at 9.2 million, the highest on record. Recent surveys for the unemployed show people have concerns that extend beyond the pandemic: health-related worries; a desire to work virtually; childcare issues; limited transportation; and the impact of increased unemployment stipends and stimulus payments. A lack of available and appropriately trained employees is affecting every sector right now.

So what does recovery look like? How does philanthropy play a role in workforce development and worker shortages? How can philanthropy address the concerns of the unemployed — the health-related fears, access to childcare, and a lack of other resources? This newest outcome of the COVID-19 pandemic is a multi-faceted challenge that will ripple throughout our region.

Building off the Philanthropy Summit from fall 2019, the Community Foundation of the Ozarks will host an educational series for our donors and funders to discuss the reasons for the worker shortage, along with tangible ways that grantmaking and charitable giving can create solutions. These monthly sessions, scheduled for August–November 2021, will focus on:

AUGUST

A high-level overview of challenges and opportunities in the region, with a look at ALICE (Asset Limited, Income Constrained, Employed) families and why some individuals are unable to reenter the workforce.

SEPTEMBER

A panel of local nonprofits working with targeted populations address this question: What are the gaps and challenges that under-resourced individuals face when reentering the workforce?

OCTOBER

A panel of employers and local agencies discuss the challenges of hiring and retaining employees, as well as available workforce training resources.

NOVEMBER

A facilitated discussion on the issue of workforce development in the region with a focus on ways funders and philanthropists can help the community.

For more information, contact Caitlin Golike, director of donor services, at cgolike@cfozarks.org or visit cfozarks.org/workforce



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PARTING SHOT: Friends and family of the late Carolyn Chittim were on hand May 21 to cut the ribbon on expanded and improved facilities for cats at the Humane Society of Southwest Missouri in Springfield. “Carolynn’s Kitty Corner” will enable the Humane Society to house more cats as well as enrich their lives while they are there. The project was made possible largely by Chittim’s significant estate gift to the CFO for the Humane Society, a no-kill shelter north of Springfield that provides health-care, adoption, education and fostering services for cats and dogs. “She was saving animals just pretty much her whole life,” said Karen Foutch, development director for the Humane Society, as the new wing was dedicated. “It is such an amazing thing she did for us at the shelter.”

