



Community Foundation of the Ozarks Summer 2008 Newsletter

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The Community Foundation of the Ozarks is committed to working with donors, Agency Partners and regional affiliate foundations to strengthen our region through asset development, grantmaking, public leadership and collaboration.

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Planned Giving News

The Community Foundation of the Ozarks is pleased to announce a new service available to donors. The GiftLegacy planned giving newsletter will be distributed weekly via email. This newsletter will feature the latest information on thoughtful planned giving strategies, as well as provide updates on legislative action that may impact financial and charitable matters.

Sign up to receive this newsletter on the web at <http://cfozarks.giftlegacy.com>. Or give us a call at (417) 864-6199.

We hope that this newsletter and our enhanced donor services website will assist you in considering planned charitable giving. You also will enjoy the wide variety of Ozarks stories that appear on our website, www.cfozarks.org. This is just another aspect of our efforts to promote philanthropy throughout our region.

CFO Celebrates \$50 Million Given Back

CFO held its annual donor celebration on Tuesday, June 3 at the home of Mr. Larry and Dr. Nancy O'Reilly. More than 200 people attended the event, and affiliate community foundations were well represented with guests attending from Cuba, Lockwood, West Plains, Monett, Gainesville and many other Ozarks communities.



John Courtney, STC Founder and former CFO board chair, says a few words about the Fund for Springfield. Also pictured are Dr. Nancy O'Reilly and Sally Baird, CFO board of directors chair-elect.

At the event, donors who established funds during the 2008 fiscal year were recognized and thanked for their important contributions. For the year, donors and organizations throughout the region have made approximately \$30.1 million in contributions, a fantastic number that underscores their commitment to our region. The year's contributions go hand in hand with another important milestone celebrated at the dinner, topping the \$50 million mark in charitable grants and distributions since the Foundation's inception in 1973. The Foundation made more than \$13.2 million in grants and distributions in the 2008 fiscal year, a record level that heralds great things to come. CFO's board of directors also announced the fulfillment of the Fund for Springfield challenge.

Created as an unrestricted grantmaking fund, the Fund for Springfield began as a \$100,000 challenge grant from Springfield Trust and Investment Company. The Foundation's asset development committee took the challenge a step further, setting the goal of raising \$250,000, which they met.

Outgoing board members Ron Neville, the current chairman, Nancy O'Reilly and Patti Holt were honored for their service to the Foundation. The evening concluded with remarks from Sally Baird, incoming board chairperson.

Message from the Chairman



Ron Neville

...n's board of directors six years
of the organization impressed me
...n of the Ozarks had just over \$44
...in the 2003 fiscal year and made
...ts and distributions the year before.
...foundations in El Dorado Springs,
...ear brought the total number of

As you can see from the graphs on this page, the Foundation experienced substantial growth over the last six years. The Foundation's asset total now sits at \$145 million with approximately 1400 charitable funds, and the organization made \$12 million in grants and distributions for the 2008 fiscal year, exceeding the board's \$10 million goal. Last August, the Oregon County Community Foundation became our 40th regional affiliate foundation, underscoring the organization's ever expanding commitment to the Ozarks as a whole.

The numbers only tell part of the story. How we put those assets to work matters the most, and I want to highlight just a handful of our key initiatives that emphasize our goal to give something back.

Grantmakers' Challenge for Children: This 5-year response to children's "red flag" issues identified in the Community Focus report continues to grow in scope. See page 4 for an update.

Harry Cooper Supply Company Campaign for the Ozarks: \$1 million challenge grant program to develop discretionary grant funds and capacity building in rural affiliate communities.

Stewardship Ozarks Initiative: Supporting the essential work of area conservation groups through a \$1 million challenge to build endowments, planned giving strategies and more than \$130,000 a year for conservation program grants.

Fund for Springfield: Springfield grantmaking will get a boost thanks to a \$100,000 commitment from Springfield Trust and Investment Company and a \$250,000 commitment from our board. See page 1 for more.

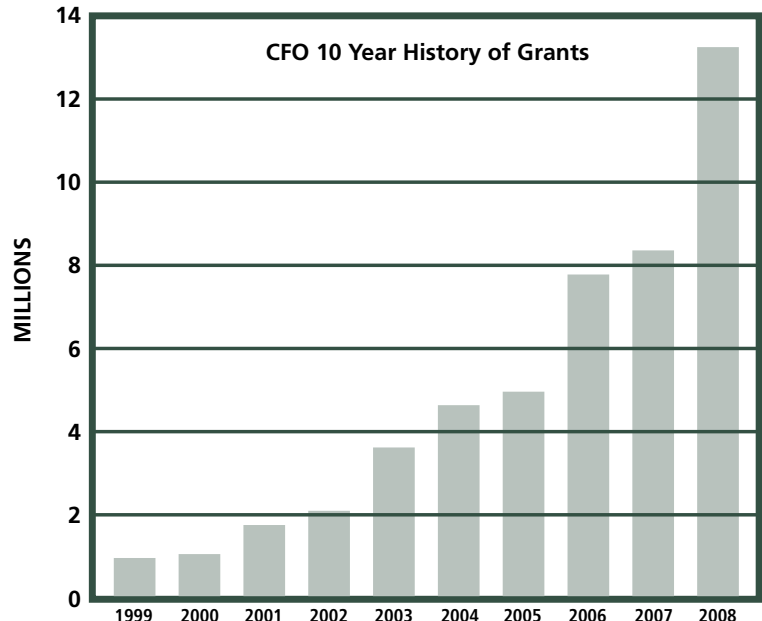
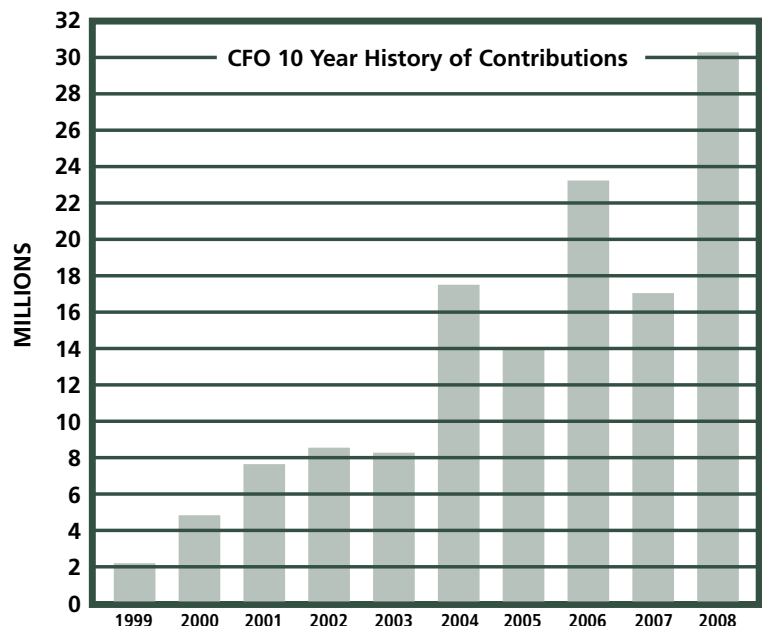
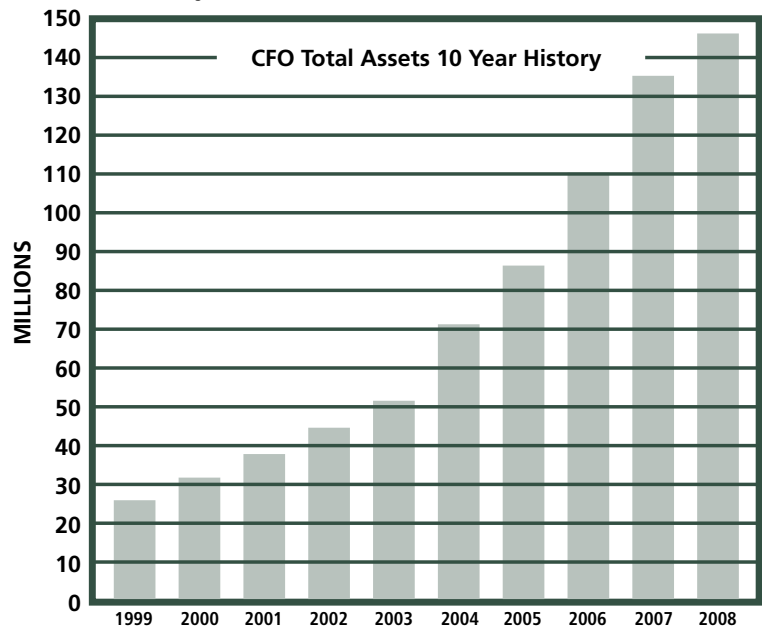
Youth Empowerment Project: Established in Springfield in 2001, this youth-led philanthropy project has now expanded to eight other communities; a reflection of our intent to take the program to scale across the region.

Springfield Regional Cultural Plan Initiative: CFO's board of directors earmarked \$150,000 for the next two fiscal years to implement recommendations of the Springfield Regional Cultural Plan developed by arts organizations in 2004 and adopted as part of the Vision 20/20 plan.

Community "Visioning" Efforts: The groundbreaking *Community Focus: A Report for Springfield and Greene County* paved the way for similar efforts by Ozarks communities to assess their strengths and weaknesses and create informed blueprints for their future. To date, Cuba, Seymour and St. James have replicated the Springfield/Greene County model.

None of this, of course, would be possible without the generosity of our donors, the leadership of our board and the dedication of our staff. It's been a pleasure serving the region as part of the Community Foundation of the Ozarks, and it's an honor, as my last official act as chairman of the board of directors, to thank everyone involved in making our Ozarks communities great places to live.

Community Foundation of the Ozarks 10 Year Growth



On the Web:
Read about all of CFO's initiatives.

Outgoing Board Members

Ron Neville

Ron Neville served six years on the board of directors. He served as chairman in the 2008 fiscal year and has been a member of the executive committee. During Ron's time as chairman, CFO reached more than \$50 million in grants and distributions since its inception in 1973. Additionally, Ron was an active and valued member and chairman of the investment advisory board. Ron also served on the governance committee and the Ozarks Charitable Real Estate Foundation board of directors. Ron is also a member of CFO's Legacy Society.



Ron Neville



Dr. Nancy O'Reilly



Patti Holt

Dr. Nancy O'Reilly

Nancy has been a member of the board of directors for six years. As the asset and development committee chair, Nancy led the charge in developing the Fund for Springfield. Because of Nancy's leadership and dedication, the asset development committee raised \$250,000 in just one year to match the \$100,000 commitment from Springfield Trust and Investment Company. Additionally, Nancy served on several committees including the education and community development grantmaking committee and the executive committee. Nancy is also a member of CFO's Legacy Society.

Patti Holt

Patti Holt ends a four-year membership on the CFO board of directors. In addition to her participation as a CFO board member, Patti served as president of the Monett Area Community Foundation. Patti also served on the regional committee as a regional board of directors representative and helped establish the Aurora and Table Rock Lake community foundations.

Scholarships Presented to Students Throughout the Ozarks

Community Foundation of the Ozarks announced scholarship recipients at the annual scholarship reception held on May 6, 2008. The Foundation also honored donors at the event, giving students the opportunity to meet and thank them. More than 200 students representing communities from across the Ozarks attended the event. Scholarship amounts ranged from \$100 to \$5,000 per year for four years. CFO board member Mel Saunders, chairman of CFO's scholarship committee, presided over the event, handing out scholarship certificates and meeting students and their families. After the scholarship presentation, students and their families were invited to watch a Springfield Cardinals matinee game.

This year, Community Foundation of the Ozarks will award more than \$565,000 in scholarships to 340 students from approximately 200 scholarship funds administered by CFO and its 40 regional affiliate foundations. This includes renewals for two and four year scholarships. CFO manages more than \$14 million in assets devoted to scholarships.

Scholarship programs continue to be an important means of giving something back to the community by affording young people the opportunity to pursue higher education. Many of these scholarship programs are cooperative efforts that work with local scholarship committees throughout the region.



Brenna O'Mealy, center, recipient of the Ruth Olsen Kelley Scholarship with Ruth Olsen Kelley, right, and her mother, Dana O'Mealy, left.

On the Web: View a complete listing of the scholarship funds managed by CFO as well as application and renewal information.

Talking Planned Giving

with Doug Nickell

Doug Nickell serves as the Foundation's legal counsel. Because of his expertise and experience in the area of trust and estate planning, Mr. Nickell has provided CFO with valued guidance and sound advice. We are continually honored to work with him. Mr. Nickell also volunteers time with CFO, speaking to agency partners, affiliate foundations and others about the importance of planned giving.

As the Community Foundation of the Ozarks begins a more focused effort to promote planned giving, Mr. Nickell was kind enough to answer a few questions on the topic.

Doug, where is your hometown? You grew up on a farm, didn't you?

I did. I grew up on a small, diversified farm just outside of Jameson, a small town in rural northwest Missouri that has all but disappeared. Springfield is definitely home, however. My wife and I have lived here for 28 years.

Where did you go to college and law school?

I have a business administration degree from Central Missouri State (now University of Central Missouri) in Warrensburg. I received my law degree from the University of Missouri - Columbia. Which is also where I met my wife, Rae, in first year evidence class.

How long have you been with Lathrop and Gage? What is your role there?

I joined Miller & Sanford in 1981 and we merged our local firm into the firm of Lathrop & Gage in 2000. My primary practice is advising individuals and families on estate planning matters, drafting wills, trusts and related estate planning documents and advising trustees and personal representatives on trust and estate administration matters. A significant portion of my practice involves charitable giving issues. I have had the privilege of advising the Community Foundation of the Ozarks since 1996.

Why do you believe that planned giving is so important for families and individuals?

Often times clients are frustrated in their ability to make current meaningful gifts to charity because of concern that they may need most or all of their financial resources to provide for their own needs during their lifetime. Making clients aware of planned giving opportunities gives them the satisfaction of being able to support causes that are important to them out of assets that remain at the time of death. Experience has shown that talking about and implementing a planned giving program as a family is a more appropriate way for parents to pass on family values than simply leaving large sums of money to children.

What would you suggest to folks as a starting point for a charitable planned gift discussion?

Ideally, charitable giving in general should be a discussion topic among parents and children, starting at a very young age and continuing even after children leave home and start families of their own. Children with a family history of charitable giving take pride in rather than resent the parents' decision to divert a meaningful portion of the family assets to charitable planned giving. The starting point is to talk about planned giving as a family, as early as possible, then to take action with the full knowledge and support of the whole family.



Grantmakers' Challenge for Children Update

The Grantmakers' Challenge for Children continues to grow with each passing quarter. The program was initially created with a goal of \$5 million dollars from Springfield area donors to address children's issues from 2006-2011. However, due to the continued dedication of a growing number of families and organizations, the Challenge has reached nearly \$12 million in gifts and pledges as of April 2008. These dollars are targeted to organizations that focus on improving the quality of life for children in the Springfield area.

The latest report will be released on August 10 at www.cfozarks.org. To learn more about this program or to become a partner, please contact Bridget Dierks at bdierks@cfozarks.org.

On the Web:

- Be sure to visit our enhanced donor services section of the website, which includes lots more planned giving information.
- Read the latest full report on the Grantmakers' Challenge for Children on the initiatives section of the website.

Updates

to Springfield Community Grantmaking Program Announced

Unrestricted grantmaking programs allow the Foundation, in our work with area leaders and service organizations, to identify and develop effective answers to the challenges facing our community: **local resources for local solutions to local issues**. Community Foundation of the Ozarks continues to improve the means by which we deliver on our promise to give something back to the community, and in keeping with that effort we are pleased to announce several new features for our Metropolitan Springfield Community Grantmaking Program, including an exciting new partnership with the Musgrave Foundation.

The Metropolitan Springfield program will distribute approximately \$780,000 for the 2008-2009 fiscal year. Of this amount, CFO budgeted \$200,000 for the ECHO project (the flagship component of the Grantmakers' Challenge for Children); the remaining \$580,000 will be available through five grant rounds focusing on six areas of emphasis.

This year, updates to the Springfield grantmaking program include:

- A new grantmaking opportunity that is part of a collaborative effort between the Community Foundation of the Ozarks and the Musgrave Foundation. The "Children's Ventures" grantmaking program will make \$50,000 in grants to address challenges facing young people. Additional details about this effort will be announced in early 2009, with the timing intended to closely parallel the Foundation's "Children's Issues in Education" grant cycle.
- The addition of a grant round focused on senior citizen issues. These grants promote well-being, accessibility of services, recreational and educational opportunities for senior members of the community. \$80,000 is available for grants in this field.
- The Arts Programming Sustainability Initiative (APSI) will award grants designed to promote and implement programs as part of Springfield's Regional Cultural Development Plan. \$80,000 is available for grants in this field. This replaces the former Arts & Culture grant round.
- An updated version of the education grant round called "Children's Issues in Education," which more specifically supports projects that facilitate innovative learning opportunities for children, progressive teaching strategies for professionals in the field and/or needed resources for educators and adults.

In keeping with precedent, grant proposals should directly address "red flag" issues identified in *Community Focus: A Report for Springfield and Greene County*. Additional details and the application are available online at www.cfozarks.org.

On the Web:

- **Get more information about the Springfield grantmaking program, including deadlines and the application.**
- **View the full list of CFO's Agency Partners with links to their websites.**

Agency Partners Program

More than 300 area organizations over the years have entrusted CFO with the management of their funds through our Agency Partners Program. However, our commitment to Ozarks nonprofit organizations goes beyond endowment building, and for that reason we're pleased to announce a new name for the program: Agency Partners Program.

We feel renaming the program better reflects the services we provide charitable organizations, whether they have an endowment fund, capacity building fund or both. Whichever route best helps an organization maintain and build the assets they need, the Community Foundation of the Ozarks still provides partners with the satisfaction of knowing their charitable dollars are being managed in a sound and responsible manner by a seasoned and dedicated investment advisory board as well as a committed staff and board of directors.

In addition to the services offered through the Agency Partners Program, we are adding professional development opportunities through our website as well as brown bag luncheons, workshops and other events. This includes a series of events in West Plains for agency partners serving the South Central Ozarks. Stay tuned for more details.

Affiliate Leadership News

Lori Smith has been elected to serve a term as the President of the Community Foundation of Southwest Missouri, Inc. Smith is also a member of CFO's investment advisory board. She replaces Robert (Bob) Copeland. During Bob's term as President, the Community Foundation of Southwest Missouri, Inc. quickly secured a second challenge grant of \$25,000 in addition to Cooper Challenge funds and has already worked to raise \$26,000 in funds to match the Cooper and second challenge. The Community Foundation of Southwest Missouri, Inc. continues to be the largest affiliate community foundation with almost \$5 million in assets.



Lori Smith
Community Foundation
of Southwest Missouri, Inc.

Janet Lockman has been elected as the Houston Community Foundation President. Her service follows Susan Warkentin, the organization's first President and founder. Janet looks forward to using the Cooper Challenge opportunity to bring greater awareness in the community. "We'd like to maximize the Cooper Challenge by getting area businesses involved in our Foundation," she said.

Mark Nelson replaces Patti Holt as the President of the Monett Area Community Foundation. Mark is serving on the Community Foundation of the Ozarks' board of directors and looks forward to leading the Monett Area affiliate through the Cooper Challenge. Patti Holt was the founding member and President of the Monett Community Foundation, which was established in 1998. Holt also served on CFO's board of directors. The Monett Area Community Foundation has more than \$1.3 million in assets.

Lockwood Youth Empowerment Project Makes First Grant

The Lockwood Youth Empowerment Program made their first grant from the Lockwood Youth Empowerment Program Capacity Building Fund on May 21. The \$500 grant provided funds for improvements to the junior class concession stand at Lockwood High School. With these improvements, new cabinets and counters will be installed. These changes will improve the efficiency of the space and help Lockwood juniors raise more funds for school projects. Congratulations to the Lockwood Youth Empowerment Program (YEP) for their quick progress from YEP establishment to successful grantmaking! The Lockwood YEP is part of the regional YEP program at CFO. For more information on regional YEP programs, please see our website: www.cfozarks.org.

Fall Regional Meetings

CFO will again host regional meetings this fall. Board members from regional affiliate foundations and leaders from area Agency Partners are invited to this year's regional meetings to brainstorm and discuss issues important to their work in the community. Topics at the meetings include a CFO update, new giving strategies, planned giving discussions and others.

The meeting schedule is as follows:

- September 30 – West Plains
- October 2 – Cuba
- October 8 – Clinton
- October 14 – Carthage
- October 16 – Branson

Exact locations and times are still being finalized. Keep an eye on the web and your email inbox for additional information.

15 Largest Affiliate Foundations in Total Assets As of June 30, 2008

Community Foundation of Southwest Missouri, Inc.	\$4,964,804
Truman Lake Community Foundation	\$3,365,070
Taney County Community Foundation	\$2,604,342
Table Rock Lake Community Foundation.....	\$2,229,888
Dent County Community Foundation.....	\$2,107,169
Willow Springs Community Foundation.....	\$1,899,629
Nixa Community Foundation	\$1,475,253
Monett Area Community Foundation	\$1,302,191
Crawford County Foundation, Inc.	\$1,172,111
Eldon Community Foundation	\$1,054,465
Bolivar Area Community Foundation.....	\$973,058
Mount Vernon Area Community Foundation.....	\$964,812
Aurora Area Community Foundation	\$859,454
Greater Seymour Area Foundation	\$808,375
Finley River Community Foundation	\$768,459

Foundation Community Grant Report

The ongoing, discretionary community grantmaking programs of the Community Foundation of the Ozarks and its regional affiliate foundations are funded with distributions from unrestricted and field-of-interest funds that are earmarked for specific communities or foundations. Grants listed below were made from March 15, 2008 through June 30, 2008.

Bolivar Area Community Foundation

Bolivar Area Chamber of Commerce
Light the Park project\$700

Butler County Community Foundation

Ripley Butler Clay Fund*
Artist grant.....\$2,500

Community Foundation of Southwest Missouri, Inc.

American Red Cross
Tornado relief for Newton County.....\$1,000
Carthage Crisis Center
Endowment building seminar\$1,000
Carthage Youth Empowerment Project Fund
Unrestricted.....\$1,000
Community Theatre of Southwest Missouri
Children's summer workshop\$900
Girl Scout Council of the Ozark Area
CPR training.....\$574
Powers Museum
Chautauqua\$295
Teen Scene of the Alliance of SW MO
School supplies.....\$500
Wildcat Glades Conservation & Audubon Center
Scholarships.....\$500
Community Clinic of Carthage
Medical supplies.....\$1,000

Dallas County Community Foundation

Dallas County Community Betterment Association
Tornado relief.....\$2,500

Douglas County Community Foundation

Ava Art Guild
Ava Honeybee Singers\$1,000
Ava High School
Project Graduation\$2,000
Child Advocacy Center
Support Douglas County Children\$1,800
City of Ava
Lifejackets for pool.....\$2,000
Dow Camp
Sponsorship for 2 campers\$100

El Dorado Springs Community Foundation

Lighthouse Children's Theatre
Program needs.....\$800

Community Foundation of the Hermann Area, Inc.

Services for cancer patients.....\$16,394.12

Marshfield Area Community Foundation

Dental services for children\$404
Marshfield R-1 Schools
Junior Jays.....\$1,500

Monett Area Community Foundation

Monett Habitat for Humanity
Unrestricted.....\$1,000
Barry Lawrence Regional Library
Building project.....\$5,000

Mount Vernon Area Community Foundation

Community Betterment Council
Park improvement project\$2,000
Lawrence County 4-H Council
Youth fairgrounds development.....\$1,000

Nixa Community Foundation

Nixa welcome sign.....\$1,000
Oldfield Opry
Pay note on building.....\$1,000

Republic Community Foundation

Ozarks Regional YMCA
Girls on the Run program\$500

Republic Early Childhood
Project Star.....\$307.36
EC outdoor classroom.....\$600
Republic Elementary III
Collaboration with early childhood.....\$109.80
Acts of Random Kindness.....\$150
Republic Elementary I
Project Read.....\$500
Republic Fine Arts Council
Children's art stations\$385
Republic High School
Airliner.....\$399
Enhancing literacy for at-risk students.....\$544
RHS landscaping project.....\$400
RHS Dance Club.....\$200
Republic Middle School
Fly Away with Math\$400

Ripley County Community Foundation

Ripley Butler Clay Fund*
Artist grant.....\$2,500

Greater Seymour Area Foundation

Seymour Dolly Parton Imagination Library
Books.....\$473.88
Fordland Dolly Parton Imagination Library
Books.....\$200.41
Mansfield Dolly Parton Imagination Library
Books.....\$178.31

Ste. Genevieve County Community Foundation

Ste. Genevieve Community Services Forum
Emergency radio equipment\$5,147
Ste. Genevieve County Road District
New safety light.....\$6,365
Dramarama Theatre
Summer programming\$15,000

Table Rock Lake Community Foundation

Christian Associates
Help establish North Stone County office\$3,500

Taney County Community Foundation

Crisis Center
Computers.....\$650
Forsyth Senior Friendship Center
Two furnaces\$775
Harmony House
Veterans' mental health needs.....\$275
Neighbor's Pantry
Youth summer meals\$500
White River Historical Society
Program for abused women.....\$300

Truman Lake Community Foundation

Clinton High School
Technology Student Association competition.....\$800
Boy Scouts, Troop 430
Campership\$1,000
Clinton Friends of the Park
Blue Star Memorial\$1,500
Clinton Recovery Center
Kitchen appliances.....\$2,500
Leesville R-9
Health screening equipment.....\$1,758.69
Atchison Monuments
Engraved bricks for community memorial\$252
Midwest Behavioral Health Care Management, Inc.
Outdoor recreation area.....\$2,500

*Fund dually listed between Butler County Community Foundation and Ripley County Community Foundation



News Makers

Filmmaker receives contributions from CFO donors

CFO donors contributed more than \$24,000 to support the Springfield-based Human Picture Initiative's documentary project, *Icyizere: Hope*. The film, created and directed by Patrick Mureithi, a Kenyan Filmmaker based in Springfield, MO, documents a three day reconciliation workshop in Rwanda that brings together survivors and perpetrators of the 1994 genocide. After several area screenings, including one at CFO, the film was shown at the Rwanda Film Festival in the Spring. CFO donors helped pay for contract labor for the documentary, including translators and typists.

OHAF awards three regional grants

The Ozarks Health Advocacy Foundation (OHAF) awarded three grants to area agencies. The grants support projects addressing critical medical, mental and dental health related needs in Ozarks communities. OHAF awarded the following grants:

- Christian County Family Crisis Center, Ozark, MO, \$2,500 for the Freedom's Rest Crisis Shelter Kitchen project.
- Children's Haven, Joplin, MO, \$2,500 to provide necessary windows and doors.
- Community Clinic of Carthage, Carthage, MO, \$2,500 to purchase glucose monitors and glucose strips.

Lockwood leaders celebrate 60th

Congratulations to Fred and LaRue Lemons who celebrated their 60th wedding anniversary in June. Fred is the President of the Lockwood Community Foundation. He and LaRue led the establishment of the Lockwood Foundation in 1998. They also serve as donor advisors to the Fred and LaRue Lemons Family Charitable Fund.

Mark your calendars

Thursday, August 7, 11:30 a.m.—Planned Giving Luncheon for Agency Partners, Doubletree Hotel, Springfield. The event will feature Dr. Nancy O'Reilly, a former CFO board member, discussing the donor's perspective on planned giving.

