

PHILANTHROPY MISSOURI GROWTH MINDSET

2021 ANNUAL REPORT



PHILANTHROPY
MISSOURI

WHO WE ARE

Leadership &
Membership

PERFORMANCE

Financials &
Expansion

WHAT WE DO

Programs &
Services



Letter From Our Leadership

Dear Members and Friends of Philanthropy Missouri,

Throughout 2021, Philanthropy Missouri — PhilMO — embarked on a strategic path toward an equitable, connected, and effective funder ecosystem across Missouri. Despite persistent pandemic challenges, we endeavored to equip, connect, and energize grantmakers for thoughtful action and greater impact in communities across the state, and employed our unique position as a statewide association of grantmakers to provide a collective voice and venue for collaboration and action.

Philanthropy Missouri experienced tremendous growth in 2021. In total, we produced 26 content programs, in-person and virtual networking opportunities, and cross-sector community events. Additionally, we delivered custom Member research requests through professional sector databases and peer surveys, and produced 26 *What Gives?* sector newsletters to connect Members with emerging information and best practices. Layered on to our robust program and service delivery, we made impressive strides in our statewide expansion work. This year marks our largest number of members in over a decade. We are delighted to welcome eleven new members from throughout the state to learn together and increase our impact as a sector.

As our Members continue to support nonprofits with innovations to address our mounting societal needs, Philanthropy Missouri remains a place of support, information, and inspiration for impact.

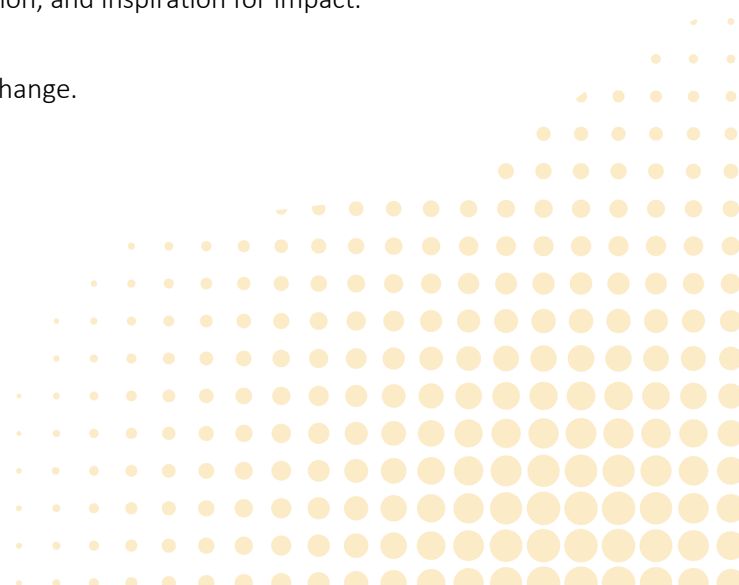
Thank you for the opportunity to work with you to create change.



Sincerely,

A handwritten signature in cursive that reads "Jane Callahan" followed by a horizontal line.

Jane Callahan
Board Chair



Who We Are

Mission: To equip, connect, and energize our members and partners for thoughtful action and greater impact.

Vision: We envision a thriving and equitable Missouri, served by a collaborative, purpose-driven, and effective philanthropic sector.

Staff



Michelle Miller
CEO



Heather Jaconis
Operations
Manager



Amanda Lands Ramrup
Programs &
Communications
Associate



Carla Brown
Operations
Associate



Amy Wescott
Director of Services,
Southwest Missouri

*After 8 amazing years as the CEO of Philanthropy Missouri, **Deb Dubin** has transitioned onward into a new role in the sector. Throughout her tenure, Deb demonstrated courageous leadership, wisdom, and vision for our future. We appreciate all you have done, and continue to do, for philanthropy. Thank you, Deb!*



2021 Board of Directors

Jane Callahan
JF Roblee Foundation
Chair

Gregory Glore
Glore Fund
Vice Chair

Vander Corliss
United Way of
Greater St. Louis
Secretary

Angela Brown
St. Louis Regional
Health Commission
Treasurer

Vianey Beltran
Wells Fargo Advisors

Barbara Carswell
YouthBridge Community

Jenny Hoelzer
Commerce Bank

Wendell Kimbrough
ARCHS

Winter Kinne
Community Foundation
of the Ozarks

Emily Koenig
St. Louis County Children's
Service Fund

Deena Lauver Scotti
Missouri Foundation
for Health

Rebekah Miller
Lutheran Foundation of
St. Louis

Al Mitchell
Bayer

D-Lori Newsome-Pitts
Ameren

Rich Ryffel
First Bank

Robin Smith
The DeBruce Foundation

Committee Members

Throughout 2021, Philanthropy Missouri's work was guided by volunteer committees. We gratefully acknowledge the important role these committees played in helping PhilMO achieve its mission.

Executive Committee

Jane Callahan, JF Roblee Foundation
Gregory Glore, Glore Fund

Vander Corliss, United Way of Greater St. Louis
Angela Brown, St. Louis Regional Health Commission

Audit Committee

Vianey Beltran, Wells Fargo Advisors
Barbara Carswell, YouthBridge Community Foundation
Stacy Clay, First Bank

Winter Kinne, Community Foundation of the Ozarks
Robin Smith, The DeBruce Foundation

Engagement Committee

Sarah Bowman, PNC
Gregory Glore, Glore Fund
Stacy Harris, Delta Dental of Missouri

Wendy Jaffe, Trio Foundation of St. Louis
Wendell Kimbrough, ARCHS
Treena Thompson, Lutheran Foundation of St. Louis

Finance Committee

Angela Brown, St. Louis Regional Health Commission
Stephanie Herbers, St. Louis City Senior Fund
Nava Kantor, Jewish Federation of St. Louis

Emily Koenig, St. Louis County Children's Service Fund
Rich Ryffel, First Bank

Governance Committee

Amy Best, Bank of America
Steve Brawley, ARCHS
Emily Fuhrman, Build-A-Bear Foundation

Jenny Hoelzer, Commerce Bank
Deena Lauver Scotti, Missouri Foundation for Health

Programs & Services Committee

Cassandra Kaufman, Saint Louis MHB
Rebekah Miller, Lutheran Foundation of St. Louis

D-Lori Newsome-Pitts, Ameren
Heidi Veron, The Saigh Foundation

Member Organizations

Grantmaking Members

Anonymous Family Private Foundation	Emerson	MiTek
Anonymous Foundation	Enterprise Holdings Inc.	Needmor Fund
Ameren Missouri	Estelle W. and Karen S. Kalish Fund	Norman J. Stupp Foundation
Anheuser-Busch	Ewing Marion Kauffman Foundation	Pettus Foundation
ARCHS	First Bank	Pillsbury Foundation
Bank of America	Forrester Family Fund	PNC
Bayer	Franciscan Sisters of Mary	Regions Bank
BKD Foundation	Glore Fund	Reinsurance Group of America
The Boeing Company	Goldstein Family Foundation	RubinBrown
Boniface Foundation	Henry A. Jubel Foundation	Saint Louis MHB
Brown Sisters Foundation	Herschend Family Foundation	Skaggs Foundation
Build-A-Bear Foundation	J&MK Fort Family Foundation	St. Louis City Senior Fund
Caola Kullman Family Fund	Jewish Federation of St. Louis	St. Louis Community Foundation
Cardinals Care	JF Roblee Foundation	St. Louis County Children's Service Fund
Centene Charitable Foundation	JPMorgan Chase & Co.	St. Louis Regional Business Council
Cigna	Light A Single Candle Foundation	The DeBruce Foundation
Clemence Lieber Foundation	Lutheran Foundation of St. Louis	The Saigh Foundation
Commerce Bank	Marillac Mission Fund	Trio Foundation of St. Louis
Community Foundation of the Ozarks	McGregor Fund	Robert J. Trulaske, Jr. Family Foundation
Crawford Taylor Foundation	Mildred, Herbert, and Julian Simon Foundation	United Way of Greater St. Louis
Dana Brown Charitable Trust	Missouri Foundation for Health	United Way of the Ozarks
Darr Family Foundation	Missouri Children's Trust Fund	Wells Fargo Advisors
Delta Dental of Missouri		YouthBridge Community Foundation
Edward Jones		

Associate & Regional Partner Members

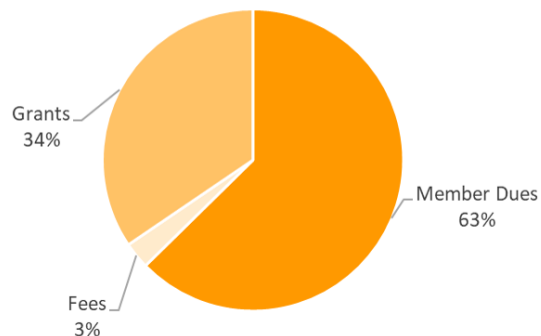
IFF	St. Louis Regional Health Commission
Insperty	The Rome Group
McMurtrey Financial Group	Vario
Mercy Investment Services	

2020 Audited Financial Statements

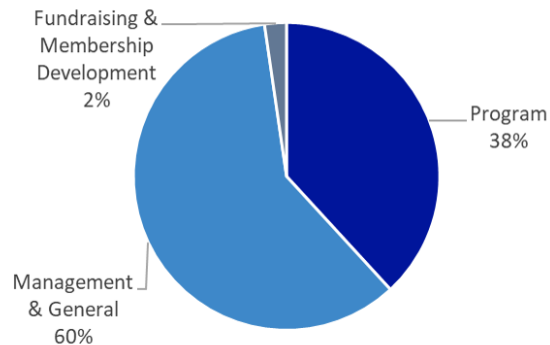
Philanthropy Missouri conducts an annual audit of our financial statements. The most recently completed audit, for fiscal year 2020, shows revenue of \$319,839 and expenses of \$341,961. During this fiscal year, Philanthropy Missouri used reserve funding to prioritize strategic planning and rebranding efforts.



2020 Revenue



2020 Expenses



2021 Grants and In-Kind Support

Philanthropy Missouri relies on our community partners for expertise, support, and collaborative effort.

To that end, we would like to thank the following organizations for providing grants and in-kind support for 2021 programs and services:

ACT for Alexandria	Forward Through Ferguson	Pettus Foundation
Association of Fundraising Professionals, St. Louis	Franciscan Sisters of Mary	Philanthropy Colorado
Ameren Missouri	Funders' Committee for Civic Participation	PNC
Boeing Global Engagement	General Service Foundation	Policy Link
Boniface Foundation	GirlTrek	Red and Black Brass Band
Burns & McDonnell Foundation	Gladiator Consulting	Regional Arts Commission
Center on Budget and Policy Priorities	Grantmakers of Oregon	Robert Sterling Clark Foundation
Cigna	and Southwest Washington	Spire
Claneil Foundation	Grantmakers of Western Pennsylvania	SRT Advising & Consulting
Clemence Lieber Foundation	GMA Foundations	STEMSTL
Commerce Bank	Greater Kansas City	St. Louis Community Foundation
Community Foundation of the Ozarks	Community Foundation	St. Louis Regional Data Alliance
Connecticut Council on Philanthropy	Headwaters Foundation	T. Rowe Price Foundation
Council on Foundations	JF Roblee Foundation	The DeBruce Foundation
Courageous Communications	KC STEM Alliance	The George Gund Foundation
Deaconess Foundation	Laird Norton Family Foundation	The Saigh Foundation
Democracy Ascent Advisors	Lutheran Foundation of St. Louis	The Whitman Institute
Economic Opportunity Funders	McGregor Fund	Trio Foundation of St. Louis
Emerson	Missouri Budget Project	Trust-Based Philanthropy Project
Enterprise Holdings, Inc.	Missouri Foundation for Health	UMSL Community Innovation
Emerging Practitioners	Missouri Office of Childhood	and Action Center
in Philanthropy, St. Louis	National Center for Family Philanthropy	United Philanthropy Forum
Ewing Marion Kauffman Foundation	New Mexico Association of Grantmakers	United Way of Greater St. Louis
Federal Reserve Bank of St. Louis	New York Community Trust	Wells Fargo Advisors
J&MK Fort Family Foundation	Nonprofit Marketers Network - STL	YouthBridge Community Foundation
	O-STEAM	Young Nonprofit Professionals of St. Louis

What We Do

To mark our first year of statewide expansion, Philanthropy Missouri produced 26 content programs, networking opportunities, and community events; composed on-demand sector research; and embarked on a strategic path toward an equitable, connected, and effective funder ecosystem throughout Missouri. Below are some of the key programming highlights of 2021.

Affinity Groups & Peer Communities

Diversity, Equity & Inclusion

Still Separate, Still Unequal: Briefing for Education Funders, featuring David Dwight IV, Karishma Furtado, and Brishaun Hamilton of Forward Through Ferguson

Sponsored by Trio Foundation of St. Louis

Member Book Club — *Decolonizing Wealth: Indigenous Wisdom to Heal Divides and Restore Balance* by Edgar Villanueva, facilitated by Treena Thompson of the Lutheran Foundation of St. Louis, Wendy Jaffe of the Trio Foundation of St. Louis, and Ryan Strode of the Franciscan Sisters of Mary

Sponsored by Trio Foundation of St. Louis

- ◆ Kickoff Meeting
- ◆ Guided Discussion

Early Childhood

Cross-State Conversation for EC Funders, featuring the Kansas City Early Education Funders Collaborative

Sponsored by PNC

Early Childhood Funder Briefing, featuring Dr. Pam Thomas of the Missouri Office of Childhood

Sponsored by PNC

Family Foundations & Donor-Advised Funds

Family Foundation Roundtable Series, made possible through Philanthropy Missouri's partnership with National Center for Family Philanthropy

Sponsored by J&MK Fort Family Foundation

- ◆ Engaging the Next Generation
- ◆ Succession Planning and Family Transitions

Community Events

Annual Meeting, virtual celebration featuring remarks by Kathleen Enright, CEO, Council on Foundations

Sponsored by Cigna, Emerson, and Enterprise Holdings Foundation

Party to Enhance Equity in Philanthropy (PEEP) Cross-Sector Happy Hour

In partnership with Association of Fundraising Professionals St. Louis, Emerging Practitioners in Philanthropy St. Louis, Gladiator Consulting, Nonprofit Marketers Network St. Louis, and Young Nonprofit Professionals St. Louis





Regional Networking

Southwest Missouri Funder Convenings
An Introduction to Philanthropy Missouri
Online virtual convening

Philanthropic Vision for our Communities,
At Community Foundation of the Ozarks

St. Louis Funder Convenings
People in Philanthropy, At The Boathouse
in Forest Park

Sponsored by The Saigh Foundation

Philanthropy After Hours: Deb Dubin's
Farewell Gathering

At St. Louis Community Foundation

Supported by donations from the PhilMO Board

Topical Programming

Member Calls: Information Exchange and Alignment

- ◆ Grantmaker Updates and Emerging Partnerships
- ◆ Sector Leadership & Fellowship Opportunities
- ◆ Convening During COVID-19
- ◆ New Member Welcome & Wrap Up

Funder Briefing: STEM Ecosystems in Missouri,
featuring Natalie Self of STEMSTL, Martha McCabe of
KC STEM Alliance, Deb Wilson of O-STEAM, Chris Bray of
Boeing Global Engagement, and Julee Koncak of
Burns & McDonnell Foundation

Missouri Health Funders Cross-State Conversation,
featuring Dr. Dwayne Proctor of Missouri Foundation
for Health

Information & Services

Delivered custom Member
research requests through
professional sector databases
and peer surveys

Produced 26 **What Gives?**
sector newsletters with
Member updates, curated
articles, resources, and events



Skill-Building Programs

Trust-Based Philanthropy Series, facilitated by Trust-Based Philanthropy Project

- ◆ **The Purpose, Culture, & Values of Trust-Based Philanthropy**
- ◆ **Unrestricted Funding, Doing the Homework, Streamlined Paperwork**
- ◆ **Transparent Communication, Soliciting Feedback, and Support Beyond the Check**

Funder Briefing: Community Investment Explorer 2.0 & St. Louis Nonprofit Indicators Report, featuring Mike Eggleston of the Federal Reserve Bank of St. Louis and Paul Sorenson of the St. Louis Regional Data Alliance



Public Policy & Advocacy Briefings

Redistricting: A Briefing for Missouri Funders, featuring Patricia A. Swann of New York Community Trust, Cathy Duvall of Democracy Ascent Advisors, Jocelyn Bissonnette of Funders' Committee for Civic Participation, and Alexandra Rankin of Missouri Foundation for Health

2021 Federal Budget & Tax Briefing, featuring Amy Blouin of Missouri Budget Project, in partnership with Economic Opportunity Funders

Philanthropy and the American Rescue Plan: Missouri Funder Briefing, featuring Matthew L. Evans of United Philanthropy Forum, Ed Bryant of United Way of Greater St. Louis, Sarah Fox of Commerce Bank, Sheldon Weisgrau of Missouri Foundation for Health, and Tim Smith of Community Foundation of the Ozarks

Embracing A Growth Mindset

This year's Annual Meeting and Report theme — **Growth Mindset** — was inspired by how grantmakers navigate challenges, and the strength we find in centering progress over perfection as philanthropic professionals.

At its core, a Growth Mindset is one that believes that our talents and capacity aren't Fixed, rather they are constantly in development and capable of Growth.

This idea that we are full of potential and can be lifelong learners has had deep resonance across sectors, leading to many philosophical and practical applications of the model. In exploring what it means to personally and professionally operate from a Growth Mindset, the PhilMO team arrived at a few key points, shared below:

- **Embrace the Challenge:** Spend time focusing on and trying possible ways around a barrier – use challenges to develop new strategies.
- **Stretch Beyond Your Comfort Zone:** Try new things and approaches; take measured risks to grow beyond what you currently know or do well; focus on progress over perfection.
- **Learn from Failure:** Mistakes are an expected part of the learning process – reflect on and learn from failures.
- **Welcome and Act Upon Feedback:** Receive feedback as information and use it to learn and improve.
- **Hold Space for One Another:** Meet people where they are to understand and learn from their perspectives and experiences.
- **Celebrate Others' Wins:** Take inspiration and information from other's success.



Did you know? The concepts of Fixed and Growth Mindsets were developed by Carol Dweck in relation to educational psychology.

Growing As We're Going: A Reflection on Expansion

Dear Members and Friends of Philanthropy Missouri,

We entered 2021 with a renewed strategy and aspirational plans to expand our Member network from primarily the St. Louis region into the rest of the state — and what a year it was! As Director of Services for Southwest Missouri, I oversaw Philanthropy Missouri's expansion into a region I've called home for over 20 years. I love partnering with others to build things from the ground up, so despite the uncertainty and challenges before me, I set out on this incredible adventure. I soon discovered what many of you already knew: Philanthropy Missouri is a true joy to work with.

Among all the ways Philanthropy Missouri embraced a Growth Mindset in 2021, I have found that **choosing to hold space for one another** has both characterized and fueled the expansion effort. My fellow PhilMO staff, board and committee members, our Membership, and other partners chose to hold space for me, a representative of a region of the state that is often characterized only in contrast to large urban centers. They embraced me with kindness, curiosity, and support, centering our commonalities rather than focusing on perceived differences. As I have spent time with Southwest Missouri funders, I have been able to communicate with confidence that if we are to truly realize our vision to be a thriving and equitable Missouri, we not only want — but need — grantmakers from all over the state, with various lived experiences and perspectives, at the PhilMO table. I am grateful that this choice to hold space has been part of the culture of Philanthropy Missouri during this first year of our statewide expansion. I believe this commitment sets a precedent that will yield growing trust between funders statewide, strengthening our Member network. Choosing to hold space for our fellow Missouri grantmakers is a relatively small act that, when committed to over time, has the potential to yield positive change and sustained impact in our communities, regions, and state for years to come.

I am optimistic about the future of philanthropy in Missouri. As we head into 2022, with another targeted expansion into the Greater Kansas City area, let's continue to choose to hold space for one another and commit to learning from our fellow Missouri grantmakers. Thank you for welcoming me so warmly this year. I am filled with gratitude for you and for the opportunity to participate in this important work in Missouri.



Sincerely,

Amy Wescott

Amy Wescott
Director of Services,
Southwest Missouri



PHILANTHROPY
MISSOURI
impact inspired.

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