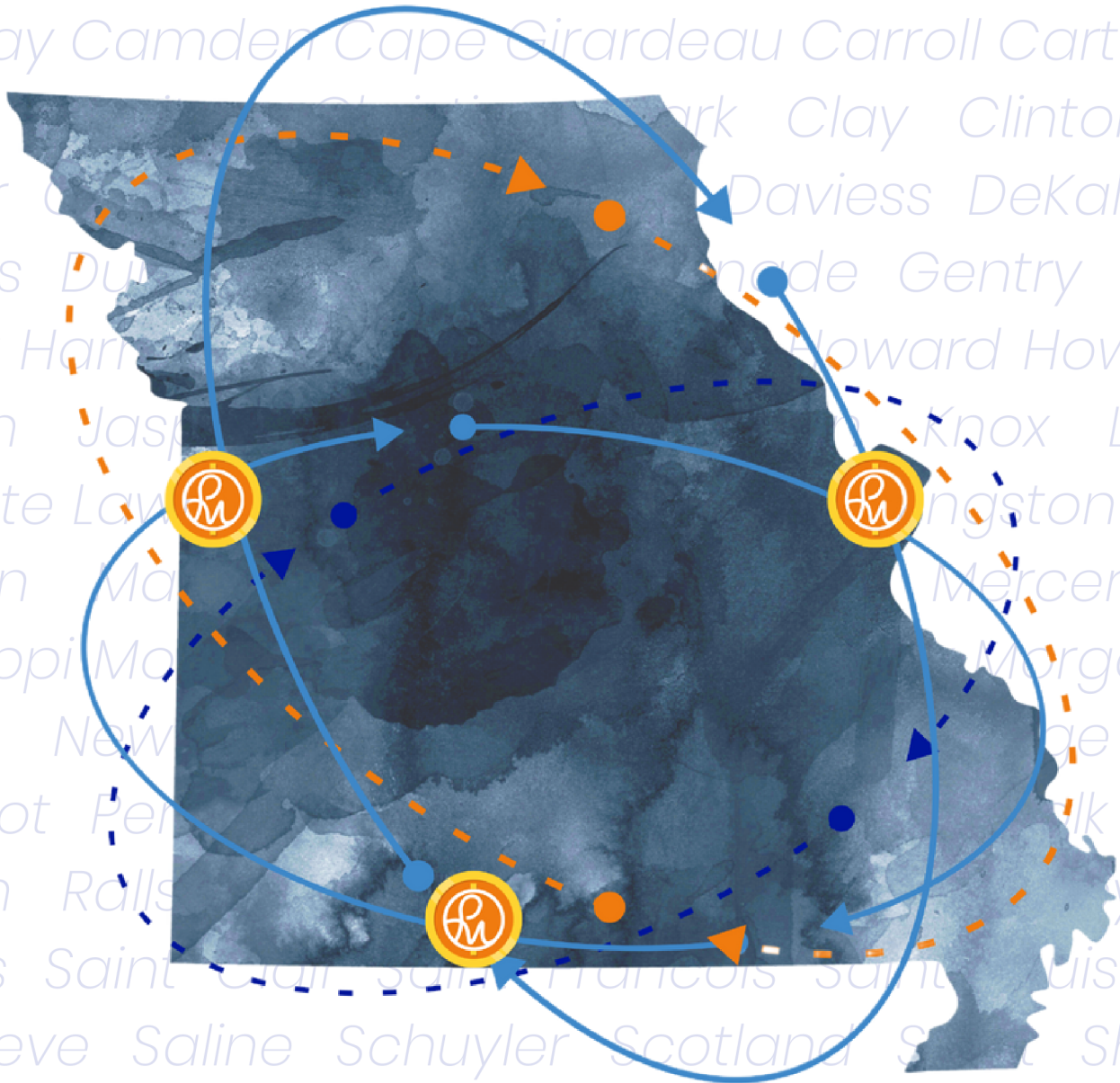


SHOW-ME philanthropy

2022
ANNUAL
REPORT

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**PHILANTHROPY
MISSOURI**

WHO WE ARE
Leadership &
Membership

WHAT WE DO
Programs &
Services

PERFORMANCE
Financials &
Member Survey



Letter From Our Leadership

Dear Members and Friends of Philanthropy Missouri,

I joined this Board in January 2020, as we were anticipating celebrating our 50th anniversary and launching an ambitious planning process. We didn't know yet how profoundly the dual pandemics of 2020 would shape our next steps and final strategic plan.

As I conclude my second year as Board Chair, I'm proud to highlight some key strides we are making to realize the vision of our 2021-2024 strategic plan. Our five goals – Expand Statewide, Deepen Value & Optimize Capacity, Build Member Service & Sector Leadership, Center Equity, and Strengthen Organizational Sustainability – are moving forward with purpose!

In 2022, Philanthropy Missouri continued to expand – aiming to connect the ecosystem of grantmakers across the state to forward a thriving, equitable Missouri. We welcomed ten new and returning voices to our table. Our growing and geographically diverse membership only better positions us to offer a collective voice and venue for thoughtful collaboration and action.

PhilMO embraced the opportunity to weave in-person programs among virtual offerings this year. We produced or partnered on thirty educational programs, networking opportunities, and cross-sector community events. We responded to Member research requests and published twenty curated What Gives? newsletters. And we are also exploring a new service: serving as the fiscal agent for a multi-Member project (the nascent Missouri Council on Aging).

As we work to optimize capacity and model our equity commitments, it is important to reflect on how this year was marked by staff transitions. We bid fond farewells to Amanda Lands-Ramrup as well as long-time Operations lead, Heather Jaconis. We celebrated Carla Brown's promotion from temporary staff to a permanent, part-time Operations Associate based in St. Louis and Amy Wescott's promotion to Vice President, a full-time role based in Southwest Missouri. We also welcomed JoJo Weatherspoon as full-time Program & Communications Coordinator based in St. Louis, and Whitney True Francis, as part-time Outreach Manager based in Kansas City.

While we've seen staff growth overall, Philanthropy Missouri remains a lean organization. To fully realize our strategic vision, we will need the continued, thoughtful contributions of Member volunteers. There are so many ways to contribute to the membership, including responding to Member surveys, serving on committees and working groups, offering to lead or sponsor programs, and even taking the time to offer meaningful feedback after attending a program. I invite you to consider how you can contribute to and learn through PhilMO in 2023!

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



Sincerely,

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

Jane Callahan
Board Chair, 2021-2022

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



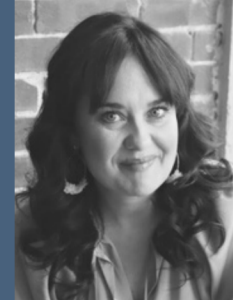
Amy Wescott
Vice President



JoJo Weatherspoon
Programs & Communication Coordinator



Carla Brown
Operations Associate



Whitney True-Francis
Outreach Manager



Amy Wescott honored as one of Springfield's 2022 Most Influential Women

After 5 1/2 years of valuable service, Heather Jaconis departed Philanthropy Missouri for a Director role in the nonprofit sector. Throughout her tenure, Heather maintained organizational efficiency and championed inclusive practices. PhilMO is a stronger organization because of her work. Thank you, Heather!



2022 Board of Directors

Jane Callahan, Chair
JF Roblee Foundation

D-Lori Newsome-Pitts, Vice Chair
Ameren

Angela Brown, Secretary
St. Louis Regional Health Commission

Emily Koenig, Treasurer
St. Louis County Children's Service Fund

Vianey Beltran
Wells Fargo Foundation

Sarah Bowman
PNC

Barbara Carswell
YouthBridge Community Foundation

Vander Corliss
United Way of Greater St. Louis

Rita Cortés
Menorah Heritage Foundation

Wendell Kimbrough
ARCHS

Winter Kinne
Community Foundation of the Ozarks

Deena Lauver Scotti
Missouri Foundation for Health

Rebekah Miller
Lutheran Foundation of St. Louis

Al Mitchell
Bayer

Rich Ryffel
First Bank

Robin Smith
The DeBruce Foundation

Gwen Wurst
Greater Kansas City Community Foundation

Committee Members

Throughout 2022, 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*
D-Lori Newsome-Pitts, Ameren

Angela Brown, St. Louis Regional Health Commission
Emily Koenig, St. Louis County Children's Service Fund

Audit Committee

Vianey Beltran, Wells Fargo Advisors
Barbara Carswell, YouthBridge Community Foundation
Stacy Clay, First Bank
Vander Corliss, United Way of Greater St. Louis

Engagement Committee

Sarah Bowman, PNC Bank*
Greg Burris, United Way of the Ozarks
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
Robin Smith, The DeBruce Foundation

Finance Committee

Emily Koenig, St. Louis County Children's Service Fund*
Meghan Connell, Skaggs Foundation
Stephanie Herbers, St. Louis City Senior Fund

Nava Kantor, Jewish Federation of St. Louis
Rich Ryffel, First Bank
Marissa Wickham, Commerce Bank

Governance Committee

Steven Brawley, ARCHS*
Deena Lauver Scotti, Missouri Foundation for Health*
Amy Best, Bank of America

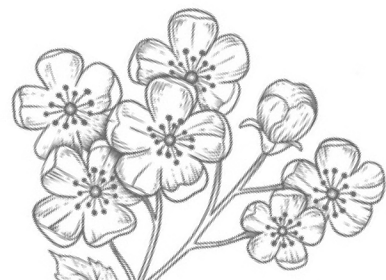
Rita Cortés, Menorah Heritage Foundation
Emily Fuhrman, Build-a-Bear Foundation
Winter Kinne, Community Foundation of the Ozarks

Programs & Services Committee

Rebekah Miller, Lutheran Foundation of St. Louis*
Sarah Fox, Commerce Bank
Cassandra Kaufman, Saint Louis MHB
D-Lori Newsome-Pitts, Ameren

Gwen Wurst, Greater KC Community Foundation
Heather Zoromski, Darr Family Foundation
Bradley Herschend, Herschend Family Foundation

* Committee Chair



Member Organizations

Grantmaking Members

* New Member in 2022

AFPF
Ameren Missouri
Anheuser-Busch
Anonymous Foundation
ARCHS
Bank of America
Bayer Fund
Boeing Company
Boniface Foundation
Brown Sisters Foundation
Build-A-Bear Foundation
Caola Kullman Family Foundation
Cardinals Care
Centene Charitable Foundation
Central Bank of the Ozarks *
Cigna
Clemence Lieber Foundation
Commerce Bank
Community Foundation of the Ozarks
Crawford Taylor Foundation
Dana Brown Charitable Trust
Darr Family Foundation
DeBruce Foundation
Delta Dental of Missouri
Edward Jones
Emerson
Enterprise Holdings Inc.
Estelle W. and Karen S. Kalish Fund
Ewing Marion Kauffman Foundation
First Bank
Forrester Family Fund
Franciscan Sisters of Mary
FORVIS Foundation
Glore Fund
Goldstein Family Foundation
Great Southern Bank *
Greater Kansas City Community Foundation *
Herschend Family Foundation
Incarnate Word Foundation *
J&MK Fort Family Foundation

Jewish Federation of St. Louis
JF Roblee Foundation
Joplin Regional Community Foundation *
JPMorgan Chase & Co.
Light a Single Candle Foundation
Lutheran Foundation of St. Louis
Marillac Mission Fund
McGregor Fund
Mildred, Herbert, and Julian Simon Foundation
Missouri Foundation for Health
Missouri's Children's Trust Fund
MiTek
Needmor Fund
Norman J. Stupp Foundation
Pillsbury Foundation
PNC Bank
Regional Business Council
Regions Bank
Reinsurance Group of America
RubinBrown
Ryan and Amanda Stanley Fund *
Saigh Foundation
Saint Louis MHB
Simmons Bank *
Skaggs Foundation
St. Louis City Senior Fund
St. Louis Community Foundation
St. Louis County Children's Service Fund
St. Louis Office for Developmental Disability Resources *
TKD Foundation *
Trio Foundation of St. Louis
Trulaske Family Foundation
United Way of Greater St. Louis
United Way of the Ozarks
Wells Fargo Foundation
Vowels Stovern Wealth, LLC *
YouthBridge Community Foundation



Associate & Regional Partner Members

IFF
Mercy Investment Services

The Rome Group
St. Louis Regional Health Commission



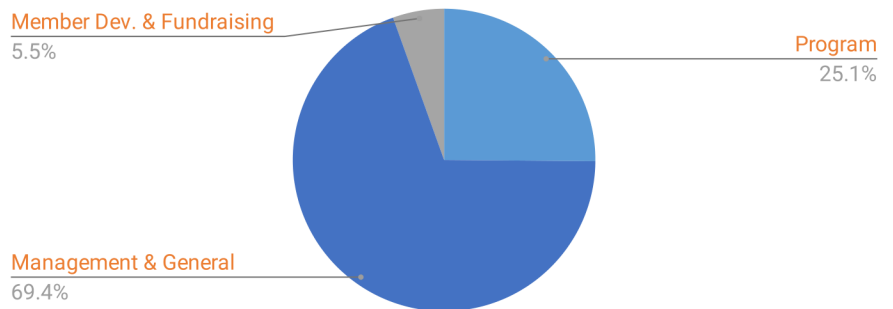


2021 Audited Financial Statements

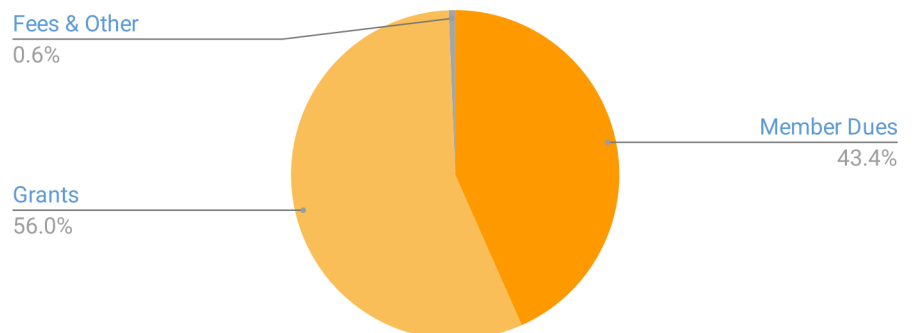
Philanthropy Missouri conducts an annual audit of our financial statements. The most recently completed audit, for fiscal year 2021, shows revenue of \$615,351 and expenses of \$354,596.

During this fiscal year, Philanthropy Missouri experienced reduced spending due to staff transition and increased grant support, including multi-year support of our statewide expansion through 2024. Additionally, several one-time gifts were made in honor of the contributions of outgoing President & CEO, Deb Dubin.

2021 Expenses



2021 Revenue



2022 Grants and In-Kind Support

With a lean team, 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 2022 programs and services:

AlignED
Ameren Missouri
ARCHS
Beginning Futures STL
Boniface Foundation
Brown Sisters Foundation
Campfire
Center on Budget and Policy Priorities
Center for Disaster Philanthropy
Center for Holocaust and Genocide Studies at
 US Military Academy, West Point
Clay County Senior Service Fund
Clemence Lieber Foundation
Commerce Bank
Community Foundation of the Ozarks
Deaconess Foundation
DeBruce Foundation
Delmar DivINe
Diversity Awareness Partnership
Economic Opportunity Funders
Emerson
Enterprise Holdings Inc.
Emerging Practitioners in Philanthropy (EPIP) St. Louis
Ewing Marion Kauffman Foundation
Ford Foundation
FORVIS
Funders Learning & Evaluation Group (FLEG)
Gateway Early Childhood Alliance
Grantmakers for Effective Organizations (GEO)
Greater Kansas City Chamber of Commerce
Great Southern Bank
J&MK Fort Family Foundation
Light a Single Candle Foundation
Lily Family School of Philanthropy (IUPUI)
Lutheran Foundation of St. Louis
Kansas City Early Education Funders Collaborative
Marillac Mission Fund
McGregor Fund
Mid-America Regional Council (MARC)
Missouri Budget Project
Missouri Foundation for Health
Missouri Office of Childhood
MiTek
National Center for Family Philanthropy (NCFP)
NCCJ
The Pillsbury Foundation
Platform Civic Strategies
PNC Bank
RRF Foundation
RubinBrown
Rung for Women
The Rome Group
Saint Louis MHB
St. Louis City Senior Fund
St. Louis Community Foundation
Stanley Durwood
Trio Foundation of St. Louis
United Philanthropy Forum and its
 Collaborating Members
US Department of Housing and Urban
 Development
US Department of State
WEPOWER
Wells Fargo Foundation
YouthBridge Community Foundation



What We Do

To mark our second year of statewide expansion, and our first year re-introducing in-person events (since the start of COVID), we produced or partnered on 28 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 2022.

Peer Communities & Networks

Diversity, Equity, and Inclusion

Sponsored by Clemence Lieber Foundation and Supported by Trio Foundation of St. Louis

Member Book Club - *From Generosity to Justice: A New Gospel of Wealth* by Darren Walker

Facilitated by Katy Keller (Marillac Mission Fund) and Treena Thompson (Lutheran Foundation of St. Louis)

Early Childhood

Sponsored by PNC Bank

Early Childhood Policy: 2022 State Legislative Debrief

Co-hosted with the Kansas City Early Education Funders Collaborative; featuring Rochelle Bea (Beginning Futures STL), Charli Cooksey (WEPOWER), Kelli Doyle (Stanley Durwood), and Linda Rallo (AlignED)

Public Investment in Early Childhood Education

Featuring Katie Rahn (Gateway Early Childhood Alliance)

Family Foundations & Donor-Advised Funds

Sponsored by J&MK Fort Family Foundation

Roundtable - Complexities of the Collective: Balancing Individual and Family Interests

Made possible through PhilMO's partnership with the National Center for Family Philanthropy

Corporate

Roundtable - Cultivating Employee Engagement in the Community

Featuring Andrea Brady (Great Southern Bank) and Clare Brewka (MiTek)

Skill-Building Programs

Elevate Your Practice: Understanding 990s & Audited Financial Statements

Facilitated by Amy Altholz (RubinBrown) and Deena Lauver Scotti (Missouri Foundation for Health)

Strengthening Funded Partner-Funder Relationships Through Honest Conversations

Facilitated by St. Louis Funders Learning and Evaluation Group (FLEG)

Topical Programming

2022 Federal Budget and Tax Briefing and the Implications for Missouri

Featuring Amy Blouin (Missouri Budget Project), in partnership with Economic Opportunity Funders

Quarterly Member Calls

Q1: New Collaborations and Initiatives

Q2: Beyond Traditional Grantmaking

Q3: You Lead, We Learn

Q4: Inflation Situation & Economic Forecast

Responding to Extremism:

New Thinking about Norms and Trust

Co-hosted by PhilMO and multiple philanthropy-serving organizations; featuring Dr. David Frey, Founding Director for Holocaust and Genocide Studies (United States Military Academy, West Point)

Studies (United States Military Academy, West Point)

Community Events

Funder and Community Coffee Break: Meet Michelle Miller

Facilitated by Danielle Wallis (Brown Sisters Foundation)

Philanthropy Missouri 2021 Annual Meeting: Growth Mindset

Sponsored by Emerson, Cigna, Enterprise Holdings, and Light a Single Candle Foundation

Featuring Marcus Walton (Grantmakers for Effective Organizations)

20th Annual St. Louis Philanthropic Landscape

Hosted by The Rome Group, with funder panel facilitated by PhilMO CEO

INsights at Delmar DivINe: Building the Nonprofit Ecosystem

Hosted by Delmar DivINe and WU Center for Human Service Leadership

Emerging Philanthropic Practitioners Fireside Chat

Facilitated by former St. Louis EPIP Chapter Leaders



Regional Networking

SWMO Funder Convenings

Hosted by Community Foundation of the Ozarks

Philanthropy Beyond the Pandemic Initiatives & Collaborations Successes & Challenges

SWMO Philanthropy After Hours

Sponsored by Community Foundation of the Ozarks and Missouri Foundation for Health

St. Louis Funder Convenings

People In Philanthropy Luncheon

Sponsored by Enterprise Holdings Foundation

Hosted by Rung for Women

Winter Philanthropy After Hours at Atelier 1879

Made possible by Member-provided general operating support

Lunch with Leaders

Made possible by the general operating support of Ameren Missouri

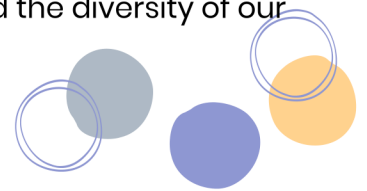
Serena Muhammad (Saint Louis MHB)

Brian Fogle (Community Foundation of the Ozarks)

Steven Brawley (ARCHS)

Information & Services

- Delivered custom Member research requests through professional sector databases and peer surveys.
- Produced 20 *What Gives?* sector newsletters with Member updates and curated state and national news, articles, resources, and events.
- Designed and launched a pilot project to serve as fiscal agent for a Member project: Missouri Council on Aging.
- Convened Board, committees, and staff for DEI training facilitated by Diversity Awareness Partnership and NCCJ.
- Hosted Coro Fellow to facilitate re-launch of a Major Giving Report to be published in 2023.
- Expanded & updated the online searchable Member Directory.
Funded, in part, by a grant from United Philanthropy Forum
- Conducted Individual Survey of membership, including asking about individual identities to better understand the diversity of our membership.



2022 Individual Survey

Philanthropy Missouri surveyed our membership in November 2022 in response to the 2021-2024 Strategic Plan's call to ensure:

- *Ongoing monitoring and assessment of Member satisfaction*
- *Evaluation and prioritization of current services*
- *Creation of new offerings*

All to deepen relevance and value to Members while optimizing staff capacity.



Survey Respondents are a Representative Cross-Section of the PhilMO Membership by:

- Funder Type
- Geographical Location
- Professional Identity (length of time in grantmaking, role within organization)
- Individual identities (race/ethnicity, gender, sexual orientation, disability status, age)

Overall Satisfaction

In the Past 2 Years of PhilMO Programs, Services, & Resources

81 / 100

What Members Value Most about PhilMO:

- **Networking & Connection**
- **Regional/Cross-State Learning**
- **Access to Resources & Info**
- **Funder Collaboration Potential**

86 / 100

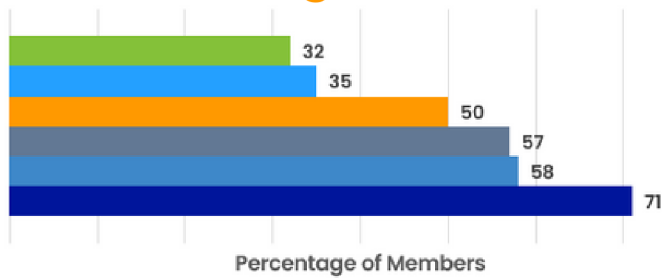
Likelihood of Recommending PhilMO

2022 Individual Survey (cont.)

In addition to assessing participation and satisfaction with past PhilMO programs, services, and resources, we surveyed interest in future:

- Program Type, Topic, and Delivery
- Services & Resources
- Offerings for Sub-Groups of the Membership (funder type, geography, organizational and individual identity)

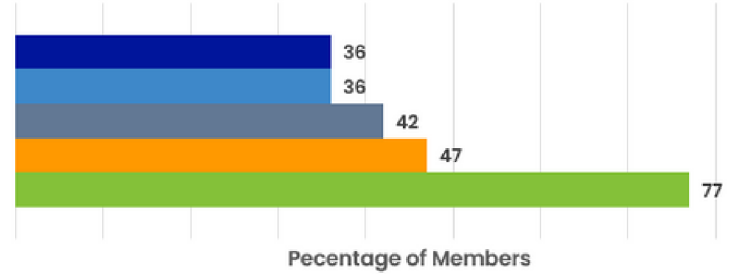
Interest in Future Programs



- With Nonprofits
- Funder-Type
- Networking
- Topical/Responsive
- Skills, Strategies & Sector Trends
- Funding-Interest

The vast majority of Members are comfortable engaging in both virtual and in-person programs.

Interest in Future Services & Resources



- Searchable Membership Directory
- Research Requests
- Consultations with Staff
- Collaborations Directory
- What Gives?

Interest in Future Sub-Group or "Network" Offerings

- Family Foundations/DAFs
- Corporate Foundation/Giving Programs
- Community Foundations
- Regional Gatherings
- Role within Organization
- Experience in Philanthropy
- Small-Staffed Organizations
- Race/Ethnicity

Looking Ahead

We are deeply appreciative of our Members giving their time to respond to this survey. As a result of feedback we received, we identified key action items for 2023 including:

- Schedule a variety of program types and formats.
- Increase number of funding-interest; skills, strategies & sector trends; and topical/responsive programs.
- Expand offerings for Members of similar funder type and geographical region.
- Host at least one role-based program and pursue "Grantmaking 101" offering.
- Continue to publish What Gives? and improve readability.
- Identify timeline for PhilMO-produced reports to publish, and secure sponsorship.
- Provide more resources for small-staffed organizations.
- Explore existing models for racial identity-based offerings.



PHILANTHROPY MISSOURI

Adair Andrew Atchison Audrain Barry Barton Bates
Benton Bollinger Boone Buchanan Butler Caldwell
Callaway Camden Cape Girardeau Carroll Carter
Cass Cedar Clark Clay Clinton Cole
Cooper Crawford Daviess DeKalb Dent
Douglas Dunklin Gade Gentry Greene
Grundy Harrison Howard Howell Iron
Jackson Jasper Knox Laclede
Lafayette Lawrence Linn Livingston
Macon Madison Mercer Miller
Mississippi Monroe Morgan New
Madrid Newton Osage Ozark
Pemiscot Perry Polk Pulaski
Putnam Ralls Randolph Ray Reynolds Ripley Saint
Charles Saint Clair Saint Francois Saint Louis Sainte
Genevieve Saline Schuyler Scotland Scott Shannon
Shelby Stoddard Stone Sullivan Taney Texas Vernon
Warren Washington Wayne Webster Worth Wright

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