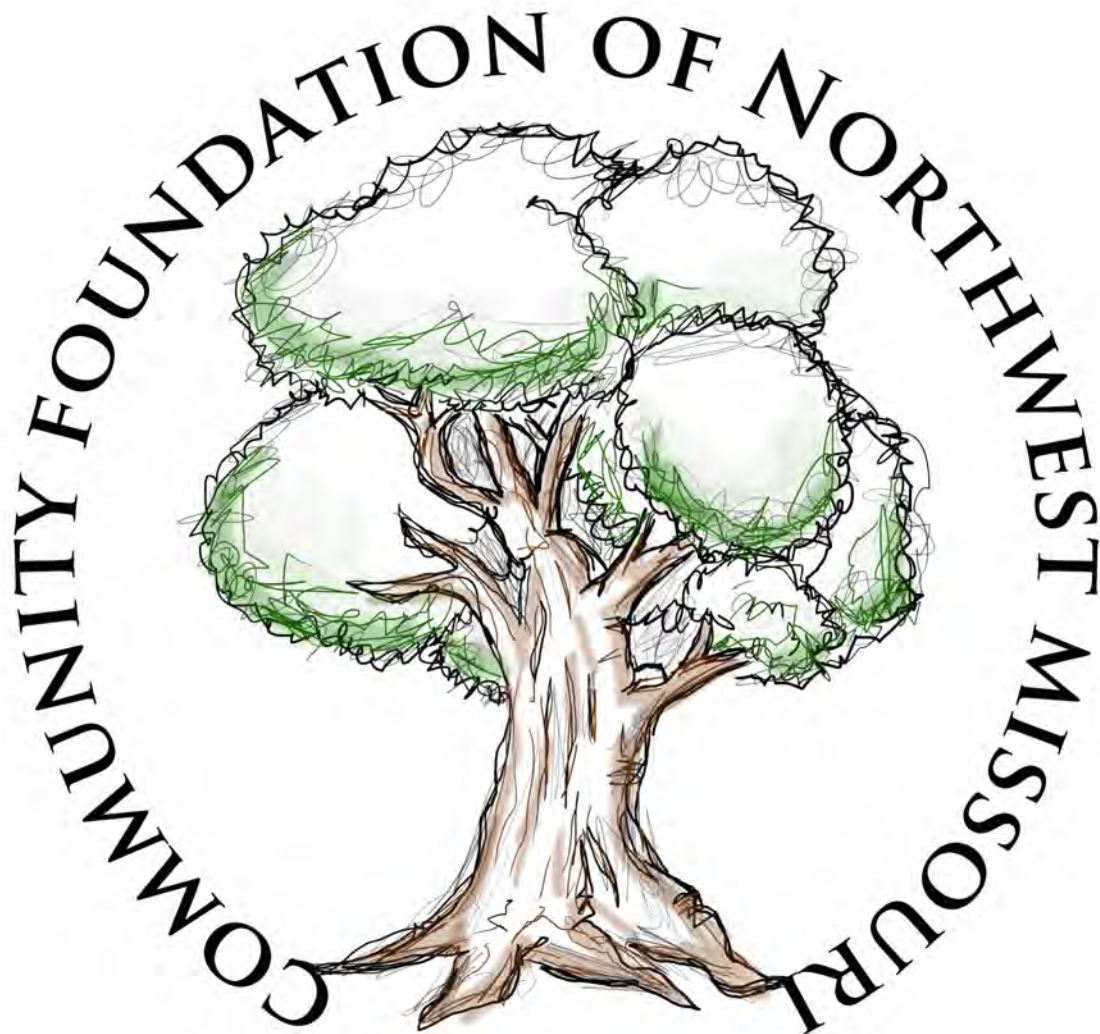


# 2012 Annual Report



*Giving back today, for tomorrow*

## From the President

Although it's been a short time since our inception in November of 2009, it also seems we've been here forever. That's a good thing. Our reputation has grown and matured as an area expert on philanthropy, a catalyst for regional vitality, and a trusted resource for administrative services for donors. We have increased funds and assets under management exponentially. The average growth rate for a community foundation is two to three percent a year. The Community Foundation of Northwest Missouri, Inc. has passed that prediction by increasing assets under management by 20% in 2012.



This past year, we hosted our First Annual Event in January with Secretary Tom Vilsack as our keynote speaker. He encouraged us to work regionally, work toward tax credits for Missouri community foundation endowment funds, communicate more with his office, and work together for regional vitality. We have worked diligently on all of these things throughout the year. To that end, we received a USDA Rural Development grant for partial funding of a Transfer of Wealth Analysis (TOW) for the state of Missouri. The other half of the funding came from the formation of the Alliance of Missouri Community Foundations which is a cohesive group for the betterment of Missouri. This effort on both fronts was led by us and for the benefit of all. A true example of what working together can accomplish!

In 2013 the newly formed Alliance of Missouri Community Foundations will unveil the results of the TOW and begin working together on an endowment campaign for each of the community foundations. As you hear these results, I ask you dream about what Northwest Missouri will be like as we partner – you and the Community Foundation of Northwest Missouri, Inc.!

*Mary R. Hinde*

### Administrative Director



Stacey Helfery

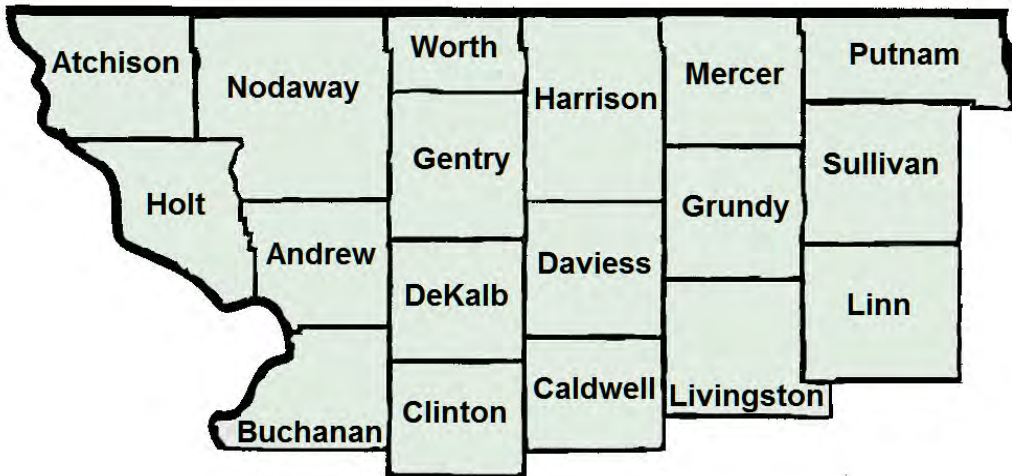
### Administrative Assistant



Patti Schultz

## Our Staff

# About Us



The Community Foundation of Northwest Missouri is a public charity serving the 18 counties of Northwest Missouri. We serve as a vehicle for charitable giving, helping donors give to the causes they care about. Donor gifts will strengthen nonprofits increasing programs and services. Individuals and organizations are encouraged to establish a fund with us.

Gifts are placed in a fund from which charitable donations are made. The Community Foundation handles the administration of the fund making giving more convenient.

We believe in the power of charitable giving to unite and transform communities in Northwest Missouri. By listening to the needs of our donors, area leaders and charity organizations, we are able to bring resources of donors and charities together!

## Board of Directors

Ed Place, Chair

Lowell Kruse, Vice-Chair

Jim Blackford, Treasurer

Mark Woodbury, Secretary

Becky Cleveland

Dick DeShon

Jon Doolittle

Ed Douglas

Richard Fordyce

Karen Graves

Stan Griffin

Brad McAnally

Andrew McCrea

Bill Phillips

Michael Poland

Al Purcell

Jan Schwarz

Gerald Sprong

Max Summers

Phil Tate

## Acknowledgments

Morris Plan

LAN Resources

Joe Stallbaumer

W. Fairleigh Enright Fund

## Our Mission:

- Promote and encourage charitable giving
- Help donors create a legacy
- Maintain donor intent
- Benefit charitable organizations in Northwest Missouri
- Ensure money earned here can remain here
- Provide efficient & effective financial management



# 2012 Annual Event



From Left to Right: U.S. Secretary of Agriculture, Tom Vilsack and CF President/CEO, Mary Hinde

The Community Foundation hosted its first Annual Event in 2012 with 300 people in attendance. U.S. Secretary of Agriculture Tom Vilsack was the keynote speaker. After an introduction by Senator Claire McCaskill, Secretary Vilsack spoke with regional leaders on how to reinvigorate rural counties. He encouraged programs such as tax credits, aiding rookie farmers, farmer's markets and creating local food systems to keep money in the area. "The real key to bringing vitality back to the community is encouraging the private sector to invest and to create opportunities," he said.

Secretary Vilsack stated in areas with shrinking populations, counties need to team up and form a regional bond where businesses can establish a food system that can create food that will eventually turn into money for the area. "Right now, the fact that you joined 15 counties together is, in and of itself, a significant event," he said.

## Distinguished Alumni Award

Joe Gray and the late Chuck Place were awarded the Distinguished Alumni Award. Both men are founding Board members of the Community Foundation. Mr. Gray is Co-founder and Chairman Emeritus of Gray Manufacturing Company in St. Joseph and Vektek, Inc. in Emporia, KS. Mr. Place was manager of Place's Stores, a family business. We thank them for their vision and commitment to Northwest Missouri!



From Left to Right: Linda Place, Ed Place, and Joe Gray

## Introducing Scholar-Link!

Scholar-Link is a program created by the Community Foundation of Northwest Missouri, Inc. to centralize all scholarships in Northwest Missouri. The goal is to create one scholarship application to be filled out by high school students in Northwest Missouri. The scholarship application would then be loaded into a database which would determine which scholarships the students are eligible for, creating a pool for each scholarship. The pool of candidates will be given to each scholarship committee for selection.

### Purpose:

The purpose of the Scholar-Link program is to improve the scholarship process by:

- Ease the burden of filling out multiple applications. The student will only fill out one application for all scholarships in Northwest Missouri.
- Help students find more scholarship opportunities
- Create a larger pool of candidates for each scholarship in an effort to be IRS compliant.
- Diversify the recipients so more students receive scholarships rather than one student receiving multiple.

The Community Foundation has partnered with undergraduate students from Missouri Western State University's Craig School of Business and Northwest Missouri State University to conduct research, data collection and develop marketing materials. Computer Science Graduate students from Northwest Missouri State are developing the database.

The program will be unveiled at the start of the 2013-2014 school year.

## Financials

Assets.....\$14,739,590

Contributions....\$2,109,470

Operating Expenses....\$171,624

Grants.....\$1,188,754

Planned Giving....\$5.5 Million

## USDA Grant

The Community Foundation received a Rural Business Opportunity Grant (RBOG) from the USDA in the amount of \$32,500. The grant will be used in partnership with 9 other Missouri Community Foundations to complete a Transfer of Wealth (TOW) Study statewide. The TOW is an estimate of household estate wealth that will be transferred from one generation to the next.

At least \$75 trillion will transfer from parents to children and philanthropists to charities in the next 50 years. It is the largest wealth transfer in U.S. history. The results will be used by Community Foundations to increase charitable giving.

## Statewide CF Alliance

The Community Foundation led the initiative to form the first Alliance of Missouri Community Foundations. The Community Foundation of Northwest Missouri, Inc. realizes the importance of regional thinking. As a result, the Alliance was formed so all 10 Missouri Community Foundations can begin collaborating to make Missouri more sustaining and a better place to live. The Alliance's first task will be completing the Transfer of Wealth (TOW) Study and educate Missourians of its importance.



Members of the Alliance of Missouri Community Foundations

# Fund Listing

## Field of Interest Funds

7 To 70 Literacy Fund  
Albany Animal Shelter Helping Hands Fund  
Bob and Margaret Phelps Fund  
Charles H. Taylor Memorial Fund  
Greater Life Sports & Education Fund  
Health Innovation of St. Joseph Fund  
Midwest Adaptive Sports Fund  
Rescued Readers Fund  
St. Joseph School District Foundation Hillyard Fund  
St. Joseph School District Foundation Meierhoffer Memorial Fund  
St. Joseph School District Foundation Music In the Schools Fund  
St. Joseph School District Foundation Ruby Wells Memorial Fund  
St. Joseph School District Foundation Sprong Fund  
St. Joseph School District Foundation W. Fairleigh Enright Fund  
SRT Fund  
Tuskegee Eagles Fund

## Scholarship Funds

Barbara Nixon Sprong Memorial Scholarship Fund  
Bob Phelps Sr. Memorial Scholarship Fund  
Jerry and Sandra Mogg Scholarship Fund  
Karen I. Karns Memorial Scholarship Fund  
Lori Holley Memorial Scholarship Fund  
Ray Alburn Memorial Scholarship Fund  
St. Joseph School District Foundation Awalt & Helen Steffen Memorial Scholarship Fund  
St. Joseph School District Foundation Benton Education Fund  
St. Joseph School District Foundation Colonel Morgan Memorial Fund  
St. Joseph School District Foundation Echo Scholarship Fund  
St. Joseph School District Foundation Kenney Memorial Fund  
St. Joseph School District Foundation Lori Schmitter Memorial Fund  
St. Joseph School District Foundation Maxine Sklenar Fund  
St. Joseph School District Foundation Robaska Memorial Fund  
St. Joseph School District Foundation Robert Limle Memorial Fund  
St. Joseph School District Foundation Sarilee Optican Memorial Fund  
Wyatt Park Baptist Alyce Lawrence Scholarship Fund  
Wyatt Park Baptist Ruth Huston Scholarship Fund

## Designated Funds

Anonymous Funds  
St. Joseph School District Foundation CHS Stadium Fund  
St. Joseph School District Foundation Soaring on to Glory Fund

## Donor Advised Funds

Anonymous Funds  
Gerald and Barbara Sprong Charitable Fund  
Gray Family Charitable Fund  
Grey Charitable Fund  
Hinde Family Fund  
Lowell and Leslie Kruse Charitable Fund  
Myers Family Charitable Fund  
Phillips Family Fund  
Stanley K. and Janet L. Griffin Charitable Fund  
W. Fairleigh Enright Charitable Fund

## Organization Funds

Anonymous Funds  
Family Guidance Fund  
Founders Circle—CFNWMO  
FGC Endowment Fund  
Nodaway Chorale Fund  
Savannah School District Foundation  
Savannah School District Foundation Endowment  
St. Joseph School District Foundation

*We would like to thank all of our donors for their commitment to the Community Foundation and Northwest Missouri!!*



## Organizations Receiving Grants from CFNWMO Donors

Albany Animal Shelter  
Albrecht-Kemper Museum of Art  
Allied Arts Council  
American Red Cross  
America's Second Harvest of Greater St. Joseph  
Augustana College  
Baptist Home – Chillicothe  
Boy Scouts of America – Pony Express Council  
Brookdale Presbyterian Church  
Buchanan County Agri-Business Expo Center, Inc.  
Children's Hopechest  
Children's Mercy Hospital  
City of Milan  
Cotillion for Achievement  
Fellowship of Christian Athletes  
First Presbyterian Church  
Friends of the Free Clinic  
Girl Scouts of NE Kansas and NW Missouri  
Heartland Foundation  
Heartland Regional Medical Center  
Interfaith Community Services, Inc.  
Interserv Foundation  
Junior Achievement  
Kansas University Endowment Association  
Lac Courte Oreilles Foundation, Inc.  
Ladies Union Benevolent Association  
Lakeview Village Foundation  
Living Community of St. Joseph Foundation  
MHA Alumni Association Foundation  
Minnesota Medical Foundation  
Missouri Colleges Fund, Inc.  
Missouri Western State University Foundation  
Movember, Inc.  
Muscular Dystrophy Association  
Northwest Missouri United Labor Agency (AFL-CIO)  
Open Door Food Kitchen  
Performing Arts Association  
Pony Express Museum  
Robidoux Resident Theatre  
St. Ann's Catholic School  
St. Joseph Community Chorus  
St. Joseph Historical Society  
St. Joseph Museum  
St. Joseph School District  
St. Joseph Symphony Society  
St. Mary's Catholic Church  
St. Paul Lutheran Church  
Salvation Army  
Samaritan Counseling Center, Inc.  
Social Welfare Board  
Sophie Jane Darr Children's Foundation  
Special Olympics Missouri  
State Historical Society of Missouri  
United Cerebral Palsy of Northwest Missouri  
United Way of Greater St. Joseph  
University of Minnesota  
Visitation Church  
YMCA of St. Joseph  
Young Life of Greater St. Joseph  
YWCA of St. Joseph

## Scholarship Recipients

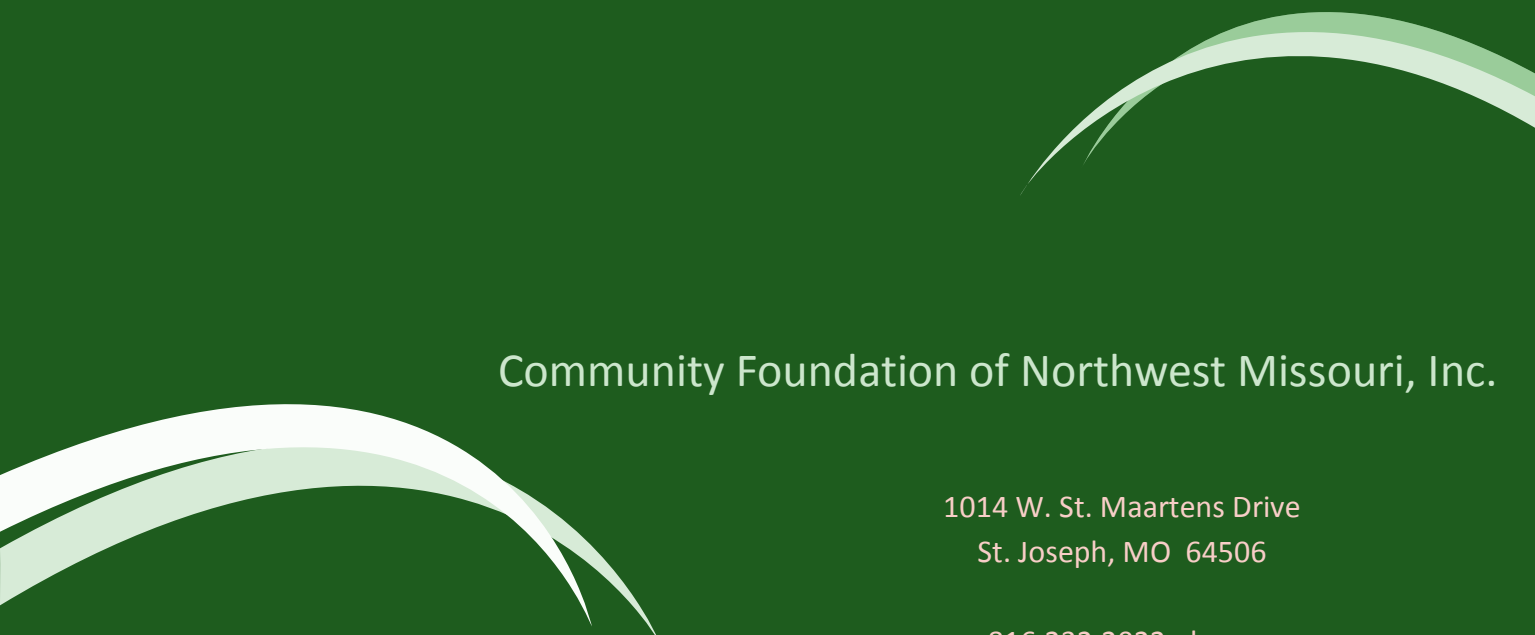
Stephen Craig Browning, University of Missouri  
Spencer Darnall, Missouri Western State University  
Kathy Daniel, William Woods University  
Shawn Fowler, Northwest Missouri State University  
Melina Grier, Central Baptist Theological Seminary  
Michael Gunter, University of Central Missouri  
Alexander Hamilton, William Jewell  
Deannah Jackson, Missouri Western State University  
Jesse Johnson, University of Missouri  
Olivia Matthews, University of Missouri  
Kyle Murphy, William Jewell  
Kody Nelson, University of Nebraska-Lincoln  
Abigail Norcross, Southwest Baptist University  
Tania Ramos, Graceland University  
Kristopher Redus, Southwest Baptist Theological Seminary  
McKenzie Riddle, Missouri Western State University  
Justin Ross, Missouri Western State University

Alex Speltz, Massachusetts Institute of Technology  
Kallie Speltz, University of Nebraska-Lincoln  
Brooke VanCleave, Truman State University  
Lauren VanCleave, Northwest Missouri State University  
Melanie Wedel, DeVry University



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St. Joseph, MO 64506

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