

PHILANTHROPY MISSOURI

ANNUAL REPORT
FOR 2023



WHO WE ARE

Who We Are

Since 1970, Philanthropy Missouri (formerly known as Gateway Center for Giving) has helped donors to learn, connect, and act with impact. Our Members include corporations, family foundations, donor-advised funds, private foundations, tax-supported foundations, trusts, and professional advisors who are actively involved in the philanthropic sector.

Vision

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

Mission

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

Values

With robust input from Committee members and staff, the Board of Directors adopted a new slate of values to guide how Philanthropy Missouri grows, lives its Mission, and forwards its Vision.



→ **Belonging**

We cultivate relationships and build community where individuals and institutions are understood, respected, and invited to contribute.

→ **Courageous Leadership**

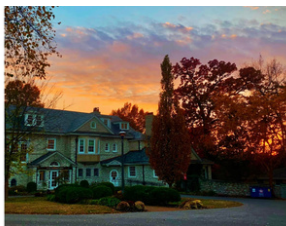
We inspire the sector to challenge norms and mobilize resources to advance opportunities to thrive in Missouri.

→ **Equity**

We believe identity should not predict outcomes for Missourians and use that lens to shape our work and influence philanthropic practice.

→ **Impact**

We create an environment of shared learning to forward a strategic, collaborative, and equitable philanthropic sector.



This year we moved our St. Louis office. We appreciate the St. Louis Community Foundation for their years of warm hospitality and are settling in to our new space at The Delmar DiviNe at 5501 Delmar Blvd, Suite A310, St. Louis, MO 63112.

OUR LEADERSHIP



Staff



Michelle Miller
CEO



Amy Wescott
Vice President



JoJo Weatherspoon
Programs &
Communication
Coordinator



Carla Brown
Operations
Associate

A special thanks to Whitney True Francis for her 2023 PhilMO work in Kansas City!

2023 Board of Directors



Wendell E. Kimbrough
ARCHS
Chair



Angela Brown
St. Louis Regional Health
Commission
Vice Chair



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



Vianey Beltran
Wells Fargo
Foundation
Secretary



Jane Callahan
JF Roblee
Foundation
Past Chair



Sarah Bowman
PNC



Barbara Carswell
YouthBridge
Community Foundation



Vander Corliss
United Way of
Greater St. Louis



Rita Cortés
Menorah Heritage
Foundation



Kiesha Hammock
Deaconess Foundation



Winter Kinne
The Community
Foundation of the Ozarks



Deena Lauver Scotti
Missouri Foundation for
Health



Rebekah Miller
Lutheran Foundation
of St. Louis



Rich Ryffel
First Bank



Robin Smith
The DeBruce
Foundation



Gwen Wurst
J.R. Albert
Foundation

COMMITTEE MEMBERS

Audit Committee

Vianey Beltran | Wells Fargo Advisors
Stacy Clay | First Bank
Vander Corliss | United Way of Greater St. Louis

Engagement Committee

Sarah Bowman | Chair | PNC Bank
Greg Burris | United Way of the Ozarks
Gregory Glore | Glore Fund
Wendy Jaffe | Trio Foundation of St. Louis
Treena Thompson | Lutheran Foundation of St. Louis
Robin Smith | The DeBruce Foundation

Executive Committee

Wendell Kimbrough | Chair | ARCHS
Angela Brown | Vice Chair | St. Louis Regional Health Commission
Vianey Beltran | Secretary | Wells Fargo Foundation
Emily Koenig | Treasurer | St. Louis County Children's Service Fund
Jane Callahan | Past Chair | JF Roblee Foundation

Finance Committee

Emily Koenig | Chair | St. Louis County Children's Service Fund
Barbara Carswell | Youthbridge Community Foundation
Meghan Connell | Skaggs Foundation
Kiesha Hammock | Deaconess Foundation
Stephanie Herbers | St. Louis City Senior Fund
Marissa Wickam | Commerce Bank

Governance Committee

Steve Brawley | Co-Chair | ARCHS
Deena Lauver Scotti | Co-Chair | MFH
Amy Best | Bank of America
Jane Callahan | JF Roblee Foundation
Rita Cortés | Menorah Heritage Foundation
Winter Kinne | Community Foundation of the Ozarks

Programs & Services Committee

Rebekah Miller | Chair | Lutheran Foundation of St. Louis
Sarah Fox | Commerce Bank
Nya Grimes | Ameren
Stacy Harris | Delta Dental
Bradley Herschend | Herschend Family Foundation
Cassandra Kaufman | Saint Louis MHB
D-Lori Newsome-Pitts | Ameren
Gwen Wurst | Greater KC Community Foundation
Heather Zoromski | Darr Family Foundation



Launching Networks

PhilMO Networks (formerly "Peer Communities" and "Affinity Groups") got a strategic redesign in 2023. Corporate and St. Louis Networks are in formation. Special thanks to our Network Member-Advisors who helped establish the Family Foundation & Donor-Advised Fund Network and the SWMO Funder Network: Anne E. McGregor (McGregor Fund | Neighbor Company), Marissa Rosen (Trio Foundation of St. Louis), Sarah Moody (Missouri Foundation for Health), and Heather Zoromski (Darr Family Foundation).

MEMBER ORGANIZATIONS

Grantmaking Members

AFPF	Mildred, Herbert, and Julian Simon Foundation
Ameren Missouri	Missouri Foundation for Health
Anheuser-Busch	Missouri's Children's Trust Fund
Anonymous Foundation	Norman J. Stupp Foundation
ARCHS	PNC
Bank of America	Regional Business Council
Bayer	Regions Bank
Boniface Foundation	Reinsurance Group of America
Brown Sisters Foundation	Robert J. Trulaske, Jr. Family Foundation
Cardinals Care	Ryan and Amanda Stanley DAF
Central Bank of the Ozarks	Saint Louis MHB
Cigna	Shepard McCaskill Foundation*
Commerce Bank	Silver Dollar City Foundation*
Community Foundation of Northwest Missouri*	Simmons Bank
Community Foundation of the Ozarks	Skaggs Foundation
Crawford Taylor Foundation	St. Louis City Senior Fund
Dana Brown Charitable Trust	St. Louis Community Foundation
Darr Family Foundation	St. Louis County Children's Service Fund
DeBruce Foundation	St. Louis Office for Developmental Disability Resources
Delta Dental of Missouri	St. Louis Regional Health Commission
Edward Jones	The Boeing Company
Emerson	The Community Foundation of Northwest Missouri
Enterprise Mobility Foundation	The Needmor Fund
First Bank	The Pillsbury Foundation
Flourish-A Family Foundation*	The Saigh Foundation
Forrester Family Fund	TKD Foundation
FORVIS Foundation	Trio Foundation of St. Louis
Glore Fund	United Way of Greater St. Louis
Goldstein Family Foundation	United Way of the Ozarks
Great Southern Bank	Vowels Stovern Wealth, LLC
Greater Kansas City Community Foundation	Wells Fargo Foundation
Herschend Family Foundation	YouthBridge Community Foundation
Horwitz-Friedman Charitable Fund*	
Incarnate Word Foundation	
J&MK Fort Family Foundation	
James S. McDonnell Foundation*	
Jewish Federation of St. Louis	
JF Roblee Foundation	
JPMorgan Chase & Co.	
Light a Single Candle Foundation	
Lutheran Foundation of St. Louis	
Marillac Mission Fund	
McGregor Fund	

Associate & Regional Partner Members

Foundation Source*
Gladiator Consulting*
Mercy Investment Services
The Rome Group

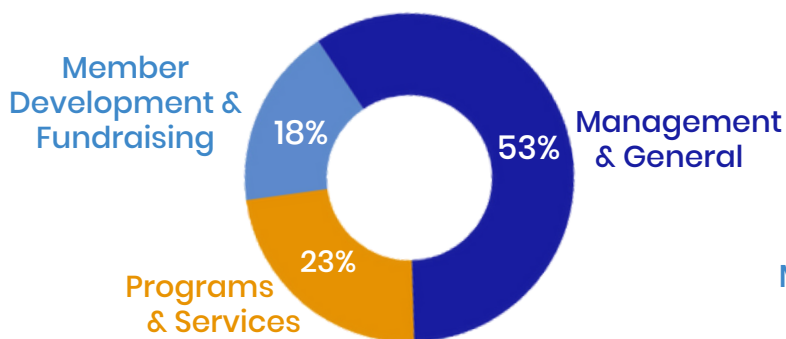
*Indicates new Member in 2023

2022 AUDITED FINANCIAL STATEMENTS

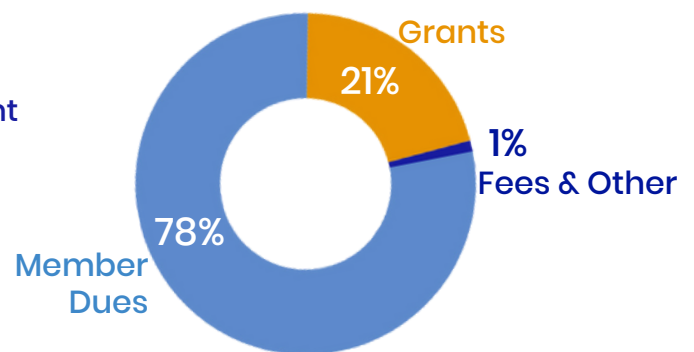
Philanthropy Missouri conducts an annual external audit of financial statements and makes the most recent report (along with organizational annual reports) available publicly [here](#). The most recently completed audit, for fiscal year 2022, shows \$373,947 in revenues, expenses of \$429,353, and reserves of \$500,277. The report reflects an organization continuing in transition. In FY2022, PhilMO invested time and resources in infrastructure, including staffing, to support statewide services and the hopeful return of more in-person programs in FY2023.

FY2022 also brought growing awareness that the current Member Dues schedule was not designed to support a statewide organization. Rates have remained flat since 2012 with the last strategic adjustment to schedule dating back to the late 1990s. With Member leadership, a Dues Working Group will assess the dues structure and staff will pilot additional revenue model possibilities, such as serving as a fiscal sponsor.

FY22 Expenses



FY22 Revenues

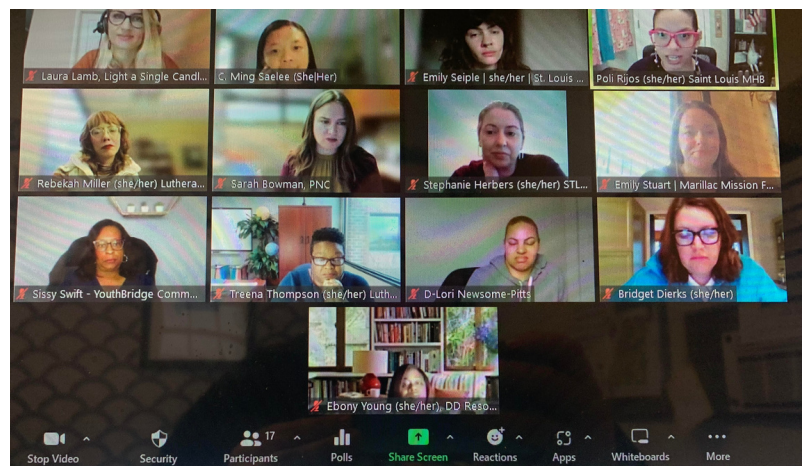


2023 GRANTS AND IN-KIND SUPPORT

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 2023 programs and services:

ABFE
Alliance for Justice
ARCHS
A Village for Good
Bolder Advocacy
Boniface Foundation
Brookings Institution
Burrell Behavioral Health
Chief Executives for Corporate Purpose
Clemence Lieber Foundation
Codefi Foundation on Rural Innovation
Commerce Bank
Community Partnership of the Ozarks
Community Foundation of the Ozarks
Council on Foundations
DD4 Consulting, LLC
Deaconess Foundation
Economic Opportunity Funders
Empower: Abilities
eFactory
EITC Funders Network
Emerson
Federal Reserve Bank St. Louis
Forward Through Ferguson
Foundant Technologies
Funders for Justice
FutureGood
Gateway Childhood Alliance
Gladiator Consulting
Goshen Consulting
Grantmakers for Effective Organizations
Great Southern Bank
Herschend Family Foundation
J&MK Fort Family Foundation
Kaiser Health News
Kids Win Missouri
Light a Single Candle
Marillac Mission Fund
Missouri Children's Trust Fund
Missouri College & Career Attainment Network
Missouri Foundation for Health
Missouri Independent

National Center for Family Philanthropy
Network for Strong Communities
Ozarks Area Community Action Corporation
Philanthropy New York
PNC
River City Journalism
Rural LISC
Silver Dollar City Foundation
Springfield Chamber of Commerce
Staff the Mission
Stone County Developmental Disability Board
Technology Association of Grantmakers
The Bridgespan Group
The Rome Group
The Saigh Foundation
Trio Foundation
Trust-Based Philanthropy Project
United Philanthropy Forum
United Way of the Ozarks
University of Missouri
University of Missouri Extension Center for Applied Research & Engagement Systems
St. Louis Community Foundation
St. Louis Development Corporation
St. Louis MHB
Walton Family Foundation
Youthbridge Community Foundation





2023 PROGRAMS & SERVICES

To serve our growing statewide membership, we produced or collaborated on 41 educational and networking programs and community events designed to equip, connect, and energize our Members and partners for thoughtful action and greater impact in Missouri. Below are key programming highlights of 2023.

STATEWIDE CONVENINGS

Show-Me Philanthropy Statewide Conference & Annual Meeting

Sponsored by Emerson, Enterprise Mobility Foundation, Federal Reserve Bank of St. Louis (host), Foundant, St. Louis Community Foundation, and an anonymous donor

Rural Philanthropy Summit

Made possible through partnership with the Community Foundation of the Ozarks and sponsorship support from Silver Dollar City Foundation

NETWORKS

Corporate Funder Network

- Roundtable: Network Launch & 2023 Giving in Numbers Report & Anti-ESG Toolkit
In partnership with Chief Executives for Corporate Purpose (CECP)

Family Foundation & Donor-Advised Fund (DAF) Network

Network sponsored by the J&MK Fort Family Foundation

- Roundtable: Network Launch
- Roundtable: Effective Family Philanthropy
Made possible through PhilMO's partnership with the National Center for Family Philanthropy (NCFP)

St. Louis Funder Network

- People in Philanthropy Luncheon
Sponsored by ARCHS & Hosted at Rustic Roots Sanctuary
- Philanthropy After Hours
Sponsored by The Saigh Foundation & Hosted at Work & Leisure

SWMO Funder Network

- Who We Want to Be in 2023! (Network Launch)
- Investing in Change: Foundation Support for Lobbying & Other Advocacy
- Nonprofit Capacity Building
Hosted at the Community Foundation of the Ozarks
- Philanthropy After Hours
Sponsored by Great Southern Bank & Hosted at Hickory Hills Country Club
- People in Philanthropy Luncheon
Sponsored by the Community Foundation of the Ozarks & Hosted at Miracle on South Street



LUNCH WITH LEADERS

Designed to build connections between philanthropic leaders with long tenures in the sector and those who are new to the sector. Special thanks to our featured leaders:

Wendy Jaffe, Trio Foundation of St. Louis
Greg Burris, United Way of the Ozarks

IDENTITY-BASED CONVENINGS

CEOs/Executive Leadership

- Executive Luncheon with Kathleen Enright
Sponsored by Council on Foundations & Hosted at Olive+Oak
- Executive Coffee Break with Susan Taylor Batten & Edward M. Jones
In Partnership with ABFE & Hosted at St. Louis Community Foundation

Semi-Annual Program Staff Member Calls

Black Philanthropic Professionals

- Black Professionals Luncheon
Hosted at The Old Orchard with Chez Ali
- Strength in Unity: Black Philanthropy Power Breakfast
Hosted by Deaconess Foundation, Missouri Foundation for Health, and St. Louis Community Foundation

Growth in identity-based convenings and the launch of Networks was informed by the 2022 Member Survey!

COMMUNITY EVENTS TO CONNECT FUNDERS & FUNDED PARTNERS

Being a Future Focused Leader Now with Trista Harris

In partnership with FutureGood & Hosted at Wellspend Brewing Company

Summer Party to Enhance Equity in Philanthropy (PEEP)

In partnership with Gladiator Consulting & Sponsored by A Village for Good, Forward Through Ferguson, Gladiator Consulting, and Goshen Consulting & Hosted at Missouri Foundation for Health

TOPICAL

Scholarship Provider and Funder Listening Sessions

In partnership with Missouri College & Career Attainment Network and hosted by DeBruce Foundation (Kansas City), St. Louis Community Foundation (St. Louis), and virtually

Trends in Philanthropy Tech: Findings from 2022 Survey of Grantmakers

In partnership with Technology Association of Grantmakers

Moving Beyond Burnout: Supporting a Thriving & Equitable Workforce in Missouri

In partnership with Staffing the Mission

Summer Book Club – The Tech that Comes Next: How Changemakers, Philanthropists, and Technologists Can Build an Equitable Word

Sponsored by Wells Fargo and Trio Foundation & Facilitated by Sarah Bowman, PNC, and David Dwight IV, DD4 Consulting, LLC

Bridging Practice to Lead Forward: A Funder Briefing on Non-Profit Leadership Transition

Hosted by Philanthropy New York

Member Call: Plan on Aging, National Science Foundation Grant, Common Grant Application

The Disability Carceral State Institute

Hosted by Funders for Justice

Briefing on Early Child Landscape & Opportunities

Sponsored by PNC and featuring Missouri Children's Trust Fund, Kids Win Missouri, and Greene County cohort of Child Care & Early Education Community Planning Project

SKILL-BUILDING PROGRAMS

Demystifying Trust-Based Philanthropy Series

Facilitated by the Trust-Based Philanthropy Project

Trust-Based Philanthropy with a Racial Equity Lens: Missouri Cohort

Facilitated by the Trust-Based Philanthropy Project

Building Economic Security Infrastructure in Missouri and Building Policy Advocacy & Grassroots Organizing to Improve Economic Security

In partnership with Economic Opportunity Funders and Tax Equity Funders Network

Investing in Change: Foundation Support for Lobbying & Other Advocacy

In partnership with Bolder Advocacy and Hosted at Community Foundation of the Ozarks (Springfield), Deaconess Foundation (St. Louis), and virtually



INFORMATION & SERVICES

In 2023, PhilMO staff leveraged 2022 Member Survey analysis to launch pilot projects and maintain popular services, including:

- Investing 50+ hours to field 26 customized Member Research Requests
- Curating & publishing 22 What Gives? Newsletters
- Redesigning former “peer communities” and “affinity groups” to meet contemporary Member needs as “Networks”
- Piloting service as a fiscal sponsor for a Member project (MO Council on Aging)
- Updating Member information and building graphics to visually represent our growing statewide membership
- Responding to community requests for speakers representing the sector
- Relaunching the Capital Campaign report by gathering data for a multi-year Major Campaigns report





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