

WHITAKER FOUNDATION

ARTS
PARKS

1997
REPORT
TO THE
COMMUNITY

HEALTH

Mae Meissner Whitaker was born in Bunker Hill, Illinois, in 1883. As a young woman, she married Lyndon C. Whitaker, a successful advertising executive. After living in California for several years, the Whitakers returned to St. Louis in 1942 following Mr. Whitaker's retirement. Six years later, the widowed Mrs. Whitaker moved to the Central West End, where she lived with her sister.

Mrs. Whitaker was an avid art collector and an ardent supporter of her beloved community. The principal source of her personal wealth was the St. Louis-based McKinney Bakery Company, located at Ninth and Mound streets, owned by her brother George Meissner and brother-in-law John McKinney. The company was later purchased by General Baking Company.

Mae M. Whitaker created the Foundation upon her death in 1975 at the age of 92 as a memorial to her husband and as a means of support to our community.

In 1997, the Whitaker Foundation observed its 22nd year of philanthropy and our second year of concentrated focus on three areas of giving in the community: enhancing lives through the arts; advancing preventive health care and medical research; and encouraging the preservation and use of parks.

Although diverse, our grantees this year share common ground. Their projects promise to spread out to the roots of our community, offering services, support and solace. Our most successful grants also promise synergy. Because of their unique approach to problem solving, the unusual combination of partners or unexpected settings, these projects benefited more than just the applicants and the constituencies they serve. An example of this is the Jazz in June series at the Missouri Botanical Garden.

This free musical program drew jazz lovers to the garden and gardeners to jazz concerts, extended the use and hours of the park, and provided a performance opportunity and venue to local and regional artists. As we evaluate grant applications in the future, we will look for such synergy.

This year the Foundation made grants in support of 44 programs from an annual grant budget of approximately \$1 million. In addition to the value of these grants, the Foundation's portfolio increased 10 percent from last year and totaled \$30 million at the close of the fiscal year.

Mrs. Whitaker's acts of philanthropy continue to inspire our activities today.

Melvin F. Brown
Gretta Forrester
Eugene J. Mackey III
Andrew E. Newman

A recent address by a colleague reminded me that the grantmaking community is often called the "learning community." As you read through the accompanying list of grants, you will see evidence of the creativity and collaborative potential of the St. Louis community as we learn new ways to address pressing problems that affect the arts, our parks and our health.

I assumed the executive director position with the Foundation in mid-year, having inherited a well-designed grants system and a strong start on a year of thoughtful grantmaking. It has truly been a learning year for me.

At the conclusion of a foundation's year, it is important to analyze the grants made and look at

them not just as individual endeavors, but as a portfolio. What is striking in this year's portfolio is the increased proportion of applications funded, a reduction in requests and grants for programs outside the Foundation's stated giving areas, and especially the exciting new partnerships built between agencies that were previously funded individually. This suggests not only that the Foundation is learning about the community we work to serve, but that the community is learning about the Foundation. I look forward to a new year as the Whitaker Foundation and St. Louis join together to build a learning community that enhances our arts, preserves our parks, and sustains good health.

Christy E. Gray
Executive Director

TRUSTEES

DIRECTOR

Enriching Lives Through the Arts

The arts provide a breadth and depth of experiences that touch our lives and enrich our region. By investing in the creative experiences of youth, we create opportunities for the next generation of thinkers and artists to discover more about themselves, each other, and their community. By supporting excellence in the arts, we promote art forms and institutions that challenge, entertain, and contribute to our overall quality of life.

PROMOTING ARTS EDUCATION AND ART EXPERIENCES FOR YOUTH

- Dances of India** \$5,000
To increase understanding and access to classical Indian dance.
- Forum for Contemporary Art** \$10,000
To support New Art in the Neighborhood, an apprentice program which pairs neighborhood youth with professional artists and curators to teach aspiring artists about the studio and business aspects of a career in art.
- Good Shepherd School for Children** \$1,000
To support a school-based music and dance program for developmentally delayed children.
- Herbert Hoover Boys and Girls Club** \$15,000
To construct a music room and satellite for the Saint Louis Symphony Community Music School. This is the second of three installments.
- Maryville University of Saint Louis** \$80,745
To sponsor the Print Studio in the University's new Fine Arts Building and support an annual lecture by a visiting artist. This is the first of four installments.
- Missouri Historical Society** \$38,650
To fund a neighborhood exploration program called Exploring the 'Hood. The program is part of the society's Where We Live initiative and helps children understand and examine the changing nature of neighborhoods through games, original theatrical presentations and activities.
- off the cuff productions, inc.** \$7,000
To support the children's theater troupe, Piwacket Theatre, at performances for children in area hospitals and care facilities.
- Ranken Neighborhood Health Committee** \$5,000
To support the St. Louis Jr. Hoofers' Club, a program which introduces neighborhood children to tap dancing by providing equipment, lessons and performance opportunities with a professional tap artist.

- St. Louis ArtWorks** \$10,000
To support a summer art employment and training program for area youth.
 - Taproots School of the Arts** \$10,000
To support the school's new Literacy through the Book Arts initiative.
 - University of Missouri-St. Louis and Saint Louis Symphony Community Music School** \$110,403
To support the Whitaker Music Education Collaborative, which develops music curricula for public school students at all grade levels. This is the second of four installments.
 - Washington University** \$10,000
To support the symposium Dual Muse, which examines the intersection of language and visual art in the work of modern and contemporary artists and authors. The symposium is sponsored by the Gallery of Art in conjunction with the International Writers' Center.
 - Webster University** \$7,500
To support a full scholarship in the College of Fine Arts' new two-year Theatre Management Master's Degree Program. This is the first of two installments.
 - Young Audiences of St. Louis** \$16,000
To support the annual Arts Partners Institute which brings teachers and artists together to design arts integrated curriculum.
- SUPPORTING ART PRODUCTION AND PERFORMANCE**
- Barnes-Jewish Hospital Foundation/OASIS Institute** \$5,442
To support the production of the play, *Act Your Age*.
 - Historyonics Theatre Company** \$5,000
To support the creation and performance of a play celebrating the life of James Eads, *A Bridge to the 20th Century*.

- Junior League of St. Louis** \$5,000
To support the expanded season of St. Louis Family Theater.
- The Magic House** \$40,000
To build the Whitaker Theatre as part of the expansion of the children's museum. This is the second of three installments.
- Opera Theatre of Saint Louis** \$15,000
To support the commission of a new children's opera, *Joshua's Shoes*.
- Repertory Theatre of St. Louis** \$35,000
To support the production of *Master Class* as part of the mainstage season.
- Sheldon Arts Foundation** \$38,200
To increase access to this historic and acoustically superior concert hall by nonprofit arts organizations.
- St. Louis Black Repertory Company** \$25,000
To support the company's plan for institutional advancement.
- Saint Louis Symphony Orchestra** \$100,000
To support the Symphony's efforts toward stabilization by providing funds for a matching grant program. This is the first installment of a five-year pledge.
- St. Louis Volunteer Lawyers and Accountants for the Arts** \$2,500
To support the publication of *Arts Law Memo*, a monthly newsletter on accounting and legal issues pertinent to the arts and individual artists, and to develop a mediation guide.

Total Arts Grants \$597,440



Encouraging the Preservation and Use of Parks

Parks are an invaluable humanizing asset in an urban environment, providing space for people of different ages and from all walks of life to experience relaxation and tranquillity, or to share the company of others in communal activities. By funding projects in parks, we help to create moments of joy, beauty, and neighborhood celebration that bind us together as a community.

PROMOTING URBAN PARKS AND GREEN SPACE FOR NEIGHBORHOODS

Butterfly House & Education Center \$50,000
To support the education center at the Butterfly House in Faust Park.

Gateway to Gardening \$10,000
To support the Urban Greening Partnership, a project involving neighborhood residents in local greening projects. The partners are Gateway to Gardening, Missouri Botanical Garden, and the University of Missouri-St. Louis.

Gateway Trailnet \$25,000
To support the creation of a greenway along the Mississippi and Missouri rivers.

Grace Hill Neighborhood Services \$10,000
To support AmeriCorps volunteers' work to restore the Riverfront Park and Trail for local neighborhood use.

Union West Community Corporation \$10,000
To create a ball field and community greenspace from a vacant lot in the Union West neighborhood.

ENCOURAGING PARK USE AND PRESERVATION

Compton Heights Concert Band \$5,000
To sponsor a guest artist for the 1997 summer concert series at Tower Grove and Francis parks.

Landmarks Association of St. Louis \$10,000
To develop a multi-lingual architectural guide of Forest Park, outlining areas of interest on Bi-State Development Corporation's Forest Park Shuttle Bug route.

Missouri Botanical Garden \$31,100
To fund the Jazz in June series which brings people into the garden on summer evenings to hear local and regional performers. This is the second of two installments.

Total Parks \$151,100

PARKS

Advancing Preventive Health Care and Medical Research

The Foundation has a strong tradition of funding medical research that leads to important discoveries. This past year, the Foundation also supported health-related organizations that targeted youth and supported agencies in neighborhoods where there is a clear need for improved access to health care.

PROMOTING YOUTH WELLNESS

American Lung Association \$75,000
To provide second year funding to the pilot project, Whitaker Open Airways for Schools, a school-based program aimed at identifying children with asthma and helping them manage their disease. The program involves parents, school personnel, community agencies, and volunteers as members of each child's care team.

Barnes-Jewish Hospital Foundation \$15,000
To support the New American Children's Initiative which provides case management, translators, financial support and health services to recent immigrants.

Blacks Assisting Blacks Against AIDS \$2,000
To support an age-appropriate HIV prevention program, TeenAIDS.

Childhaven \$10,000
To assist the organization in publishing its protocol on working with developmentally disabled and autistic children so the therapeutic model may be replicated in other facilities.

National Council on Youth Leadership \$2,000
To support Win With Wellness, a leadership program for high school juniors that uses health promotion activities as learning tools.

PROVIDING NEIGHBORHOODS WITH ACCESS TO HEALTH CARE

Catholic Community Services \$2,000
To support the position of a bilingual counselor in the Vietnamese Immigrant Health Center.

Planned Parenthood Association of Eastern Missouri \$50,000
To support the operations of the Frazer Medical Center in East St. Louis. This payment is the second of two installments.

HEALTH

St. Louis Children’s Hospital Foundation \$30,000

To provide start-up costs for a community-based immunization collaborative as part of the hospital’s new pediatric-focused Community Health and Wellness Program.

ADVANCING MEDICAL RESEARCH

Washington University School of Medicine \$75,000

To purchase an ultra-high-performance magnetic-field-gradient system for magnetic resonance imaging of transgenic mice.

Wellness Community of Greater St. Louis \$9,610

To develop and implement a program evaluation model that may be used in other Wellness Communities.

Total Health Grants \$270,610

Other Grants

The following grants were made outside the three specific focus areas of the Foundation.

Central West End Charitable Trust/Washington Terrace Association \$2,500

To preserve the historic gatehouse at the entrance to Mr. and Mrs. Whitaker’s former neighborhood.

St. Louis Metropolitan Association for Philanthropy \$7,000

To support the organization’s general operations.

Total Additional Grants \$9,500

TOTAL FY97 GRANTS & PLEDGES \$1,028,650

FINANCIAL STATEMENTS

As of and for the year ended April 30, 1997

STATEMENT OF FINANCIAL POSITION

Assets	
Cash and Cash Equivalents	\$ 1,462,854
Investments at Market Value	28,526,210
Interest Receivable	100,271
Other Assets	19,235
Total Assets	<u>\$30,108,570</u>
Liabilities and Net Assets	
Accounts Payable and Accrued Expenses	\$ 7,819
Grants Payable	278,853
Total Liabilities	<u>\$ 286,672</u>
Unrestricted Net Assets	\$ 29,821,898
Total Liabilities and Net Assets	<u>\$30,108,570</u>

STATEMENT OF ACTIVITIES

Revenue	
Investment Income Net of Investment Expenses	\$ 3,420,552
Total Revenue	<u>\$ 3,420,552</u>
Expenses	
Charitable Grants	\$ 948,500
Grant Administration	171,111
Excise Tax	67,092
Total Expenses	<u>\$ 1,186,703</u>
Increase in Unrestricted Net Assets Before	
Cumulative Effect of Change in Accounting Principle	\$ 2,233,849
Cumulative Effect of Change in Accounting Principle (note 1)	\$ 4,533,642
Increase in Unrestricted Net Assets	<u>\$ 6,767,491</u>
Net Assets at Beginning of Year (as restated — note 2)	<u>\$23,054,407</u>
Net Assets at End of Year	<u>\$29,821,898</u>

Note 1: In 1997, the Foundation adopted Statement of Financial Accounting Standards No. 124, "Accounting for Certain Investments Held by Not-For-Profit Organizations." In accordance with this statement, investments in equity securities with readily determinable fair values and all investments in debt securities are reported at fair value. The cumulative effect of this change is \$4,533,642.

Note 2: Net assets at the beginning of the year have been restated to include accrued interest receivable in the amount of \$94,438, which had not been recorded at April 30, 1996.

The purpose of the Foundation is to make contributions for charitable purposes qualified under Section 501(c)3 of the 1954 Internal Revenue Code. Trustees for the Foundation serve without compensation except for reasonable expenses incurred for and on behalf of the Foundation.

APPROACHING THE FOUNDATION

HOW TO APPLY FOR A GRANT

The Foundation encourages organizations with interesting ideas, initiatives, and projects that fall within our guidelines to apply for a grant. Specifically, we are interested in projects that:

- strengthen the arts;
- encourage park use and preserve parks;
- advance preventive health care and medical research.

There are two ways to approach the Foundation for funding.

The first is by Letter of Inquiry. Organizations interested in pursuing funding are strongly encouraged to first write a two-page Letter of Inquiry. Letters of Inquiry allow both the organization and Foundation to explore ideas before investing in a full proposal. The letter should provide background on the applicant organization, explain the problem it proposes addressing, describe the proposed project, and estimate total project costs and the amount to be requested from the Foundation.

Letters of Inquiry are reviewed at regular Trustee meetings and should be submitted to the Foundation no later than September 1 for October review, December 1 for January review, and March 1 for April review. Since a Letter of Inquiry is a more flexible approach, it is possible that it may be accepted after the deadline for late-breaking or time-sensitive requests. Following the Trustee meeting, staff will

inform your organization whether or not you are invited to submit a full proposal. Organizations invited to continue in the process will have one month to prepare a full proposal. It is important to note that an invitation to submit a full proposal does not guarantee that a grant award will be made to your organization.

The second approach is through the submission of a full proposal *and* a completed Whitaker Foundation Proposal Summary Form. Contact with the Foundation before submitting a full proposal is strongly recommended.

A Proposal Summary Form can be obtained by contacting the Foundation. This three-page form serves as an executive summary for the application and *must* accompany the proposal. The full proposal should include:

- an organizational background, including mission, history, types of programs offered and constituencies served;
- an analytical discussion of the problem the project plans to address;
- detailed information about the project, its execution, time frame, goals, objectives and methodologies, and how it will be evaluated;
- a project budget noting anticipated expenses, including details of how Foundation funds will be used, anticipated income, and information about other grantmakers approached for funding;

continued next page

- an organizational budget noting revenue and expenses, the organization's most recent audited financial statements, and a list of public and private sources of income;
- supporting documents that include a list of current board members with their titles, an annual report, and evidence of 501(c)3 tax-exempt status.

Proposals with completed Whitaker Foundation Proposal Summary Forms are due August 1 for October review, November 1 for January review, and February 1 for April review. These deadlines are not flexible.

All proposals and Letters of Inquiry are screened and evaluated by the staff before presentation at Trustee meetings.

The Foundation generally will not support social events such as galas or golf tournaments, preferring to support project-related requests. Faxed proposals, Letters of Inquiry or Proposal Summary Forms are not accepted. Please do not submit proposals in notebooks, binders, or plastic folders.

All proposals, Letters of Inquiry, or requests for information should be directed to: Executive Director, Whitaker Foundation, University Club Tower, 1034 South Brentwood Boulevard, Suite 402, St. Louis, Missouri 63117. Our phone number is (314) 726-2001. Our e-mail address is whitaker@stlnet.com.

TRUSTEES

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