

parks arts health

WHITAKER FOUNDATION 1998 REPORT TO THE COMMUNITY

about the whitakers

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 for our community.

from our trustees

In 1998, the Whitaker Foundation completed its 23rd year of philanthropy and its third year of concentrated focus in three areas of giving: enhancing lives through the arts, advancing preventive health care and medical research, and encouraging the preservation and use of parks.

At the end of a grant year, it is always valuable to look at the programs that have been supported as a family of grants. Again, we have reached a diverse constituency in each focus area. In some instances, our support has sustained successful and long-standing programs within the Foundation's areas of priority. In other instances, we assisted untried and highly creative approaches to community problems. The newfound alliances these grants encourage are especially satisfying to us as grantmakers. Of particular note this year is a consortium of partners that includes OASIS, Washington University School of Occupational Therapy, and the Saint Louis Symphony Community Music School. Together, these highly

divergent organizations are examining the effects of music on healthy aging. Already the results are promising, creating international interest in replicating the program.

This year, the Foundation made grants in support of 45 programs from an increased annual grant budget of approximately \$1.15 million. In addition to the value of these grants, the Foundation's portfolio increased approximately 16 percent from last year and totaled \$34,857,554 at the close of the fiscal year. From our audit, we learned the Foundation is run more cost-effectively than comparable organizations of similar size and scope.

Thanks to Mrs. Whitaker's generosity, we look forward to the Foundation continuing to address the needs of the region with creative solutions.

Melvin F. Brown
Gretta Forrester
Eugene J. Mackey III

Andrew E. Newman
Virginia V. Weldon, M.D.

from our director

As I review our grant year, two aspects of our work stand out.

First, as we enter our third year of work in our three focus areas, we have become more strategic in our grantmaking. More than in any other year, this year's grants are built on successful programs previously funded by the Foundation. An example of this is our work with Tower Grove Park. Our first grant to the park was a planning grant to guide the park's future. In our next gift, we provided funds to help execute basic rescue and preservation of park structures. This year, we allocated capital funds to turn a 1914 Roman-style public works pool pavilion into an outdoor theater, and program funds to assure the theater would have a long and vital life.

Second, I am proud of the innovations in our application process which allow agencies and Trustees greater access to each other early in the development of program ideas. The Letter of Inquiry approach,

instituted last year, creates more opportunities for innovation and risk-taking. As a result, some exciting program designs are in the works.

As 1998 ends, we bid a heartfelt farewell to Trustee Andrew Newman, whose sage advice and commitment to the Foundation has led us in new directions. We will miss his humor, his dedication, and his sense of fairness. We are all very grateful to have worked with him. We also welcome as Trustee Virginia V. Weldon, M.D., whose experiences in medicine, academia, and business benefit the Foundation enormously.

I look forward to the coming year and maintaining the high standards Mrs. Whitaker has allowed us to pursue as we work to enhance our arts, preserve our parks, and promote good health.

Christy E. Gray
Executive Director

grants to the arts

May 1997 – April 1998

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

Good Shepherd School for Children \$1,888
To support a school-based music and dance program for developmentally delayed children. This is the first installment in a three-year pledge.

Harris-Stowe State College \$58,333
To sponsor the art studio in the college's new Physical Education and Visual/Performing Arts Building. This is the first installment in a three-year pledge.

Herbert Hoover Boys and Girls Club \$15,000
To construct a music room and satellite facility for the Saint Louis Symphony Community Music School. This is the final installment of a three-year pledge.

Junior League Family Theatre \$10,000
To support the 11th season of professional children's theater at the Florissant Community Center.

The Magic House \$40,000
To build the Whitaker Theatre as part of the expansion of this children's museum. This is the final installment of a three-year pledge.

Maryville University \$39,752
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 second installment in a four-year pledge.

off the cuff productions, inc. \$5,000
To support expansion of the children's theater program, Piwacket Theatre.

St. Joseph Institute for the Deaf \$50,000
To fund a partnership with the Center of Contemporary Arts to develop and teach movement, visual and performing arts classes, and music classes.

University of Missouri-St. Louis and the Saint Louis Symphony Community Music School \$113,853
To support the Whitaker Music Education Collaborative, which develops music curricula for public school students at all grade levels. This is the third installment in a four-year pledge.

Young Audiences of St. Louis \$16,500
To support the annual Arts Partners Institute, which brings together teachers and artists to design integrated arts curricula.

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grants to the arts

May 1997 – April 1998

SUPPORTING ART PRODUCTION AND PERFORMANCE

Academy of American Poets \$1,000
To support the inclusion of St. Louis in National Poetry Month's Great Poetry Giveaway, in which 2,500 volumes of poetry were distributed in St. Louis.

Alexandra Ballet \$3,000
To provide access to the ballet for indigent nursing home residents.

Blackburn College \$5,000
To support a community arts and lecture series for residents of southern Illinois, including Mrs. Whitaker's hometown of Bunker Hill. This is the first installment in a two-year pledge.

Dance St. Louis \$25,000
To underwrite the development of an original dance by Elizabeth Streb for debut at Circus Flora.

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 careers in art.

Juneteenth Heritage and Jazz Festival \$5,000
To underwrite free jazz concerts during the festival.

League of St. Louis Theatres \$2,000
To support the production and direction of a joint marketing brochure featuring St. Louis-area theater companies. Historyonics served as fiscal agent for the grant.

Mid America Dance Company \$4,925
To underwrite the performance of an original collaboration by Stanley Elkin and Ross Winter, *Notes Toward a Eulogy for Joan Cohen*.

Missouri Historical Society \$50,000
To support *Through the Eyes of a Child*, a study and documentary of four traditionally African-American St. Louis area neighborhoods: the Ville, Carr Square, East St. Louis and Kinloch. This is the first installment in a three-year pledge.

Opera Theatre of Saint Louis \$30,000
To underwrite the performance of the opera *Arianna*, and support accompanying educational programming.

Saint Louis Art Museum \$45,000
To sponsor the local exhibition of *Masks: Faces of Culture*.

St. Louis Black Repertory Company \$25,000
To provide a second year of support for the company's plan for institutional advancement.

Saint Louis Classical Guitar Society \$10,000
To underwrite the mainstage presentation of the Romeros and support audience diversification.

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 second 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 arts organizations and individual artists, and to develop a legal guide for organizations planning festivals.

STAGES, St. Louis \$21,000
To purchase theatrical lighting equipment.

TOTAL ART GRANTS \$689,751

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grants to parks

May 1997 – April 1998

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 tranquility, 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 SPACES FOR NEIGHBORHOODS

Benton Park Neighborhood Association \$21,000
To assist in the restoration of a Victorian-era walking bridge in Benton Park. This is the first of two installments.

Gateway Greening \$15,000
To support the Urban Greening Partnership, a project involving neighborhood residents in local greening projects.

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

Florissant Old Town Partners, Inc. \$5,000
To plant trees to halt erosion of creek banks in Coldwater Creek Commons.

ENCOURAGING PARK USE AND PRESERVATION

Association of Midwest Disadvantaged Youth \$5,000
To make camp accessible for developmentally disabled children at this facility, run by volunteers.

Kirkwood Symphony Orchestra \$750
To support a summer pops series in Kirkwood Park.

Missouri Botanical Garden \$35,000
To support the Whitaker Jazz Festival, which brings people into the Garden on summer evenings to hear local and regional performers. This is the first installment in a two-year pledge.

St. Louis County Department of Parks-Historic Sites Foundation \$10,000
To purchase and relocate an antique barn at Faust Park's Historic Village for use as a multipurpose classroom and meeting space.

Saint Louis Zoo Foundation \$64,229
To support an animal contact yard in the new Children's Zoo. This is the first installment in a four-year pledge.

Tower Grove Park \$70,000
To reconfigure the pool house for use as an outdoor theater and support the Whitaker Performing Arts Series. This is the first installment in a four-year pledge.

Union West Community Corporation \$10,000
To create a ball field and community green space in the Union West neighborhood. This is the second of two installments.

TOTAL PARKS GRANTS \$245,979

grants to health

May 1997 – April 1998

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 WELLNESS

Friends of Kids With Cancer \$5,000
To create toy closets in area juvenile chemotherapy clinics.

Jackie Joyner Kersee Youth Center Foundation \$50,000
To construct a health and wellness center and sponsor an annual lecture on health issues pertinent to the center's clientele. This is the first installment in a three-year pledge.

OASIS Institute-Barnes Jewish Hospital Foundation \$50,000
To support the development of a Music and Healthy Aging program offered in conjunction with Washington University's School of Occupational Therapy and the Saint Louis Symphony's Community Music School. This is the first of two installments.

Wellness Community of Greater St. Louis \$8,000
To provide second-year support for development and implementation of a program evaluation model that may be used in other Wellness Communities.

PROVIDING NEIGHBORHOODS WITH ACCESS TO HEALTH CARE

Edgewood Children's Home \$15,000
To support the agency's merger with Childhaven and its commitment to making education and care for developmentally disabled children available in the city.

Family Care Health Center \$53,000
To support a pediatric care suite in the center's new facility in south St. Louis, and support an annual lecture on pediatric care issues. This is the first installment in a three-year pledge.

Herbert Hoover Boys and Girls Club \$25,000
To support the organization's Dental Club, which provides regular dental care for qualifying children, on-site.

ADVANCING MEDICAL RESEARCH

Urological Research Foundation \$25,000
To purchase a Doppler imaging machine for use in the diagnosis of prostate cancer.

TOTAL HEALTH GRANTS \$231,000

other grants

May 1997 – April 1998

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

Peter Drucker Foundation \$486
To provide scholarships to a national satellite conference on leadership in the nonprofit community.

TOTAL OTHER GRANTS \$486

TOTAL FY98 GRANTS & PLEDGES

\$1,167,216

financial statements

As of and for the year ended April 30, 1998

STATEMENT OF FINANCIAL POSITION

Assets

Cash and Cash Equivalents	\$ 1,335,159
Investments at Market Value	34,607,548
Interest Receivable	70,118
Other Assets	5,882
Total Assets	\$36,018,707

Liabilities and Net Assets

Accounts Payable and Accrued Expenses	\$ 7,500
Excise Tax Payable	12,991
Grants Payable	1,140,662
Total Liabilities	\$ 1,161,153
Unrestricted Net Assets	\$ 34,857,554
Total Liabilities and Net Assets	\$36,018,707

STATEMENT OF ACTIVITIES

Revenue

Investment Income Net of Investment Expenses	\$ 7,315,096
Total Revenue	\$ 7,315,096

Expenses

Charitable Grants	\$ 2,097,559
Grant Administration	92,857
Excise Tax	89,224
Total Expenses	\$ 2,279,440

Increase in Unrestricted Net Assets	\$ 5,035,656
Net Assets at Beginning of Year	\$29,821,898
Net Assets at End of Year	\$34,857,554

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;

approaching the foundation

- 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;
- an organizational budget outlining 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 Blvd., Suite 402, St. Louis, Missouri 63117. Our phone number is (314) 726-2001. Our e-mail address is whitaker@stlnet.com.

whitaker foundation

1998 TRUSTEES

Melvin F. Brown
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Christy E. Gray, *Executive Director*

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1998
REPORT TO THE COMMUNITY