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CELEBRATING 25 YEARS

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**WHITAKER
FOUNDATION**

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**REPORT TO
THE COMMUNITY
2000 - 2001**

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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.

ABOUT THE WHITAKERS 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

With this special double issue of our report to the community, the Whitaker Foundation marks 25 years of grantmaking. As Trustees, our role in the Foundation is one of stewardship – of the Foundation’s financial assets, of thoughtful investment in the community, and of the memory and wishes of our donor Mae M. Whitaker. ■ The Foundation began a quarter of a century ago with Mrs. Whitaker’s initial investment of \$3 million. The grants listed in this report alone equal \$3,844,144. This speaks to the potential and longevity of a donor’s commitment to her community. ■ In measuring the Foundation’s assets, we include much more than our endowment. We value our continued support of three focus areas: enhancing lives through the arts, preserving and encouraging use of urban parks, and advancing health care and medical research. We have worked to develop a grantmaking strategy in each area that helps us select a mix of grantees that provide stability, offer creativity, and represent the diversity of the community. ■ One of our greatest assets is our open review process.

Through it, we maintain a discourse with the community about what is needed and about what is possible. This open communication with grant-seekers enables us to find the best possible match. ■ As we close, we want to thank Gene Mackey for his term as Trustee. Gene’s larger vision of what we could be, as an institution and a community, inspired us to look past the immediate and into the future. ■ Twenty-five years later, we still reflect on the incredible generosity of Mrs. Whitaker and her trust that the St. Louisans who followed her would represent her wishes for the community’s well being. Her generosity is our inspiration.

*Melvin F. Brown
John Capps
Donald P. Gallop
Laurna C. Godwin
Dudley R. Grove*

FROM OUR DIRECTOR

In 2001, we not only marked our anniversary year, we helped several of our grantees mark important milestones. We celebrated the 75th anniversary of the birth of Miles Davis; underwrote development of an opera based on the *Tale of Genji* in observance of that work’s 1000th anniversary; and helped Dance St. Louis mark its 35th anniversary with a mix of artistic and administrative activities aimed at charting its future. ■ This year gave us an opportunity to contemplate the value of an anniversary. We took time, as we do at the close of every fiscal year, to review our past, evaluate our current practices, consider what we do well and what we can do better. ■ In our 25th year, we also took some important first steps. The Foundation made its single largest grant payment. Trustees allocated \$500,000 to the Frank Lloyd Wright House in Ebsworth Park to help purchase and preserve a pristine Wright-designed house and garden, complete with original furnishings, fabrics, plans, and correspondence. ■ We also relocated our office to the City of St. Louis and now occupy space in a converted shoe factory,

selected by Landmarks Association as an outstanding example of historic preservation. To add value, we outfitted the office so that it could be made available to nonprofits for retreat and meeting space. ■ Looking ahead, we continue to seek the best way to assist our grantees. In this report, you will notice an increase in multi-year grants. We do this hoping the chance to plan will add to the value of our contribution. We also increased our grants for stabilization and institutional advancement. As part of our self-evaluation, we tried to discern where and when grantees succeed in their development and where they begin to struggle. ■ As we prepare for the next 25 years, I look forward to the partnerships we will craft in enhancing arts, preserving and encouraging use of urban parks, and sustaining good health. While we highlight the accomplishments of a few of our agencies, we thank all our funded partners for helping us fulfill our shared missions.

*Christy E. Gray,
Executive Director*

The arts provide a breadth and depth of experiences that touch our lives and enrich

A

our region. By investing in the creative experiences of youth, we create opportunities

ENRICHING LIVES

R

for the next generation of thinkers and artists to discover more about themselves, each

THROUGH THE ARTS

T

other, and their community. By supporting excellence in the arts, we promote art forms

S

and institutions that challenge, entertain, and contribute to our overall quality of life.

GRANTS TO THE ARTS

Big River Association

To support a special anniversary issue and compact disc celebrating the 25th anniversary of the literary magazine *River Styx*.

	2000	2001
Big River Association	\$ 5,000	\$
Blackburn College	5,000	
Center of Contemporary Arts	20,000	20,000
Circus Flora	50,000	
City Museum	10,000	
		15,000
Craft Alliance		15,000
Dance St. Louis		35,000
Divinity, Inc.		2,500
Forum for Contemporary Art	28,000	28,000

Blackburn College

To support a performing arts series and outreach campaign for the community surrounding the college, including Bunker Hill, Illinois.

Center of Contemporary Arts

A two-year grant to support school-based residencies by artists performing on COCA's mainstage.

Circus Flora

To underwrite a final performance starring Flora the elephant.

City Museum

Final payment of a two-year grant to provide support for special exhibitions.

To support the activities offered in Art City, the museum's art activity center.

Craft Alliance

To underwrite support of an exhibit in cooperation with the St. Louis Science Center which explores the connection between art and science.

Dance St. Louis

To support artistic and planning activities to mark the organization's 35th anniversary season.

Divinity, Inc.

To support the opening event of the Langston Hughes Black Poetry Festival.

Forum for Contemporary Art

To support the Whitaker Classroom in the museum's new facility. Funds also support the program New Art in the Neighborhood. This concludes a three-year grant.

GRANTS TO THE ARTS

Friedens Haus

To underwrite a book arts program in which Taproots School for the Arts works with neighborhood children in writing the story of their community and publishing their own books.

2000 **2001**

\$ \$

6,240

Gash-Voigt Dance Theatre

To support the final year of a cultural exchange program with contemporary dance companies in Greece and Turkey.

10,000

To support production of an original work, which explores ideas of the sacred. In addition to a mainstage performance of the resulting work, the company offered master classes, student matinees, and discussion groups.

10,000

Good Shepherd School for Children

To support a dance and music program for developmentally delayed children. This concludes a three-year grant.

2,112

Guardian Angel Settlement Association

To support the eARTh Angels project, which pairs children with artists to turn neighborhood debris into recycled art.

20,000

Harris-Stowe State College

To create a rehearsal space in the college's new studio and performing arts center. This concludes a three-year grant.

58,333

Historyonics

To underwrite production of an original play based on the life of Georgia O'Keeffe.

10,000

Jazz at the Bistro

To support marketing and audience outreach. This concludes a two-year grant.

10,000

To provide special project assistance to mark the 75th anniversary of Miles Davis' birth.

20,000

To support the Whitaker Jazz Education Collaborative, which brings internationally acclaimed jazz artists into area classrooms for performances and master classes.

89,500

98,450

GRANTS TO THE ARTS

Junior League of Saint Louis

To support the Family Theatre Series presented at the Florissant Civic Center. Funding provides performance underwriting and outreach activities.

2000 **2001**

\$ \$

10,000

10,000

Landmarks Association

To support the creation of a guide to art and architecture in the Forest Park Southeast and Shaw neighborhoods, which follows the route of the Garden Express, the public transportation service between the Central West End, MetroLink and the Missouri Botanical Garden.

11,000

League of St. Louis Theatres

To support publication of a shared marketing brochure featuring member companies and their seasons. In 2000 the Repertory Theatre of St. Louis served as fiscal agent, in 2001 Metro Theater Company served as fiscal agent.

1,100

3,000

KFUO Radio Station

To support free instrumental music lessons for income-eligible children who show musical promise. This is the first of three payments.

20,000

The Magic House

To design an ongoing theatre activity for the Whitaker Theatre in the museum's expanded facility.

21,175

Maryville University

To create the Whitaker Print Studio in the University's new art and design building and to sponsor the annual Whitaker Visiting Artist. This concludes a four-year grant.

39,752

Metro Theater Company

To support ArtsIntersection, a theater outreach program for elementary and high school students at area public and private schools, as well as for teacher education students at Maryville University.

25,834

41,140

Missouri Historical Society

To support *Through the Eyes of a Child*, a special educational outreach program that helps area students understand St. Louis and their own place in history. This concludes a three-year grant.

50,000

To support creation of an exhibit on the life and work of Miles Davis marking the 75th anniversary of his birth. This is the first of two payments.

25,000

GRANTS TO THE ARTS

Municipal Theater Association of Saint Louis

To support renovation of the Whitaker Orchestra Pit. This concludes a three-year grant.

	2000	2001
	\$ 50,000	\$ 50,000

Opera Theatre of Saint Louis

To underwrite production of an original opera based on the *Tale of Genji* as part of the tale's millennial celebration.

This is the first of a multi-year grant in support of the company's work to develop new operas and new artists. Funds will be matched by a grant from the Ford Foundation.

	25,000	84,000
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The Repertory Theatre of St. Louis

To underwrite production of *Talley's Folly* in the company's mainstage season.

	35,000
--	--------

Robert Reed Tap Heritage Institute, Inc.

To support an annual tap festival that includes a mainstage concert and master classes with international tap artists.

	20,000
--	--------

St. Louis Black Repertory Company

To underwrite a production of *Legends* in the mainstage season and to provide a challenge grant to retire the company's debt.

	50,000
--	--------

Saint Louis Cathedral Concerts

A two-year grant to support a Whitaker concert as part of the organization's regular season.

	12,500	12,500
--	--------	--------

The Saint Louis Classical Guitar Society

To support a plan for stabilization and institutional advancement. This is the first payment in a three-year grant.

	40,000
--	--------

Saint Louis Symphony Orchestra

To assist the Saint Louis Symphony Orchestra's efforts toward agency advancement and stabilization. This concludes a five-year grant.

	100,000	100,000
--	---------	---------

To provide a challenge grant aimed at encouraging new donors.

	100,000
--	---------

St. Louis Volunteer Lawyers and Accountants for the Arts

To support publication of *Arts Law Memo* and underwrite a guide on producing a successful art festival.

	3,000
--	-------

GRANTS TO THE ARTS

Sheldon Arts Foundation

To support an outreach campaign aimed at bringing younger audiences to the concert hall.

	2000	2001
	\$ 30,000	\$ 11,250

STAGES St. Louis

To support a study of existing theatre spaces in anticipation of the company's new facility.

	10,000
--	--------

That Uppity Theatre Company

To support production of the company's *DisAbility Project* in area schools.

	12,000
--	--------

University of Missouri-Saint Louis

To support the Whitaker Recital Hall in the university's new performing arts center. The hall provides a permanent home for the Whitaker Music collaborative. This represents the second and third payment in a four-year grant.

	100,000	100,000
--	---------	---------

Washington University-Department of English

To support a conference on the life and work of Miles Davis.

	15,000
--	--------

Webster University

To create new costume and design workshops in the renovation of the Loretto Hilton Theatre. The shops will be used jointly by Opera Theatre of Saint Louis, the Repertory Theatre of St. Louis, and Webster University. This is the first and second payment in a four-year grant.

	62,500	62,500
--	--------	--------

Women's Support and Community Services

To support local exhibition of the *Dairy Barn Show* - a juried traveling exhibit of quilts by international artists.

	15,000
--	--------

Young Audiences

To support a special curriculum of artists exploring Missouri culture and history.

	25,000
--	--------

TOTAL GRANTS TO THE ARTS

	\$ 1,035,046	\$ 916,340
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P

Parks are an invaluable humanizing asset in an urban environment, providing space for people

ENCOURAGING THE

A

of different ages and from all walks of life to experience relaxation and tranquillity, or to share

PRESERVATION

R

the company of others in communal activities. By funding projects in parks, we help to create

AND USE OF PARKS

K

moments of joy, beauty, and neighborhood celebration that bind us together as a community.

S

GRANTS TO PARKS

Carondelet Community Betterment Federation, Inc.

To support renovations in Sister Marie Charles Park and Bellerive Park and to create a core of park volunteers from the surrounding neighborhood.

\$

2000

\$

2001

25,000

City of Bunker Hill

To create Mae M. Whitaker Park in Mrs. Whitaker's hometown. This is the community's first municipal park. This payment is the first payment in a four-year grant.

37,500

Compton Heights Concert Band

To support summer concerts in Francis Park and Tower Grove Park.

10,000

Forest Releaf of Missouri

To support a community nursery from which nonprofit organizations and neighborhood parks may apply for trees. This represents a two-year grant.

25,000

25,000

The Frank Lloyd Wright House in Ebsworth Park

To prepare for and purchase a Frank Lloyd Wright home, its gardens, and furnishings. The house and its gardens will be used as a park.

30,000

500,000

Friends of Greenwood Cemetery

To support restoration of an historic African American cemetery.

8,500

Gateway Greening

To support the agency's neighborhood greening program and make capital improvements to its central garden facility. This is a multi-year grant.

30,000

50,000

Gateway Parks and Trails 2000

To support a central design for a riverfront trail on both the Illinois and Missouri sides of the Mississippi River.

50,000

Laclede's Landing Foundation

To support a design plan for public art and green space on Laclede's Landing.

30,000

Lift for Life

To support creation of a sculpture park at the organization's new site. The work will be made by children participating in Lift for Life programs under the advisement of area professional artists.

3,500

GRANTS TO PARKS

The Magic House

To support the purchase of adjacent property for use as an outdoor exhibit space.

To underwrite the exhibit *Sandcastle Beach*, which turned the museum's outdoor exhibit space into a beach front park.

Missouri Botanical Garden

To support the Whitaker Jazz Festival, which provides free jazz concerts on Wednesday nights in June.

Saint Louis Brass Band

To provide traditional brass band concerts in six area parks.

Saint Louis Zoo Foundation

To support an animal contact yard in the new Children's Zoo. This concludes a four-year grant.

Shakespeare Festival of St. Louis

To support the debut of a Shakespeare Festival in Forest Park, including development of a children's interpretation of the mainstage play.

Skinker DeBaliviere Community Development Association

To build a community park in the Skinker DeBaliviere neighborhood.

Tower Grove Park

To reconfigure the pool house for use as an outdoor theater and support the Whitaker Performing Arts Series. This concludes a multi-year grant.

To restore and convert a historic plant house for use as an administrative center.

Worldways Children's Museum

To purchase a portable structure to use while displaying the H₂O Orchestra in area parks.

	2000	2001
	\$	\$
The Magic House	25,000	
		19,000
Missouri Botanical Garden	54,182	54,182
Saint Louis Brass Band	12,000	
Saint Louis Zoo Foundation	62,500	62,500
Shakespeare Festival of St. Louis		50,000
Skinker DeBaliviere Community Development Association	5,000	
Tower Grove Park	80,000	
		50,000
Worldways Children's Museum		2,900
TOTAL GRANTS TO PARKS	\$ 413,682	\$ 888,082

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ADVANCING

PREVENTIVE HEALTH CARE

AND MEDICAL

RESEARCH

The Whitaker Foundation has a strong tradition of funding medical research

that leads to important discoveries. We also support health-related programs in

neighborhoods where there is a clear need for improved access to health care.

GRANTS TO HEALTH

Alzheimer's Disease and Related Disorders Association To support satellite offices in North St. Louis City and rural Missouri.	\$	
Central Institute for the Deaf To support development of a music curriculum for students enrolled in the school.		
Family Care Health Center To create the Whitaker Pediatric Suite at the agency's new facility in South St. Louis. This concludes a three-year grant.		
Food Outreach To support an on-site nutritional counselor for people living with HIV/AIDS as part of the Whitaker Nutrition Center. This is the first payment of a two-year grant.		
Herbert Hoover Boys & Girls Club To support operation of a dental clinic at the agency's facility. These are the first two payments of a three-year grant.		
Hosea House To support Hosea House's participation in a multi-agency health fair.		
Jackie Joyner-Kersey Foundation To support the Whitaker Wellness Center at the agency's facility. This is the final payment in a three-year grant.		
OASIS Institute To support the Whitaker Music and Healthy Aging program and to evaluate the health benefits of music education for older adults. Barnes-Jewish Hospital Foundation serves as the fiscal agent.		
St. Louis Children's Hospital To provide early education and support for family members and educators of the signs of sickle cell anemia and its associated strokes. This is the first payment of a two-year grant.		
Saint Louis University School of Public Health To support a consortium of health funders' evaluation of a shared project.		

2000 **2001**

\$	\$
25,000	
	13,500
53,000	
	15,000
25,000	25,000
1,500	
50,000	
64,586	60,000
	78,570
2,004	

GRANTS TO HEALTH

The Salvation Army To support HIV/AIDS prevention, education, and detection for men seeking treatment for substance abuse or shelter. This is the final payment of a two-year grant.	\$	
Southside Day Nursery To support development of a family-based health access network in Soulard and Benton Park neighborhoods. Funds are matched by a consortium of local funders and the Robert Wood Johnson Foundation.		
Washington University School of Medicine To sponsor the Whitaker Young Investigator, a fellowship offered early in a researcher's career. This is the final payment of a two-year grant.		

2000 **2001**

\$	\$
22,834	
	17,500
83,500	
\$ 327,424	\$ 209,570
50,000	
	4,000
\$ 50,000	\$ 4,000
\$ 1,826,152	\$ 2,017,992

TOTAL GRANTS TO HEALTH

OTHER

Regional Business Council To support development of a civic engagement track for this newly formed organization of mid-cap business owners. This is the first payment in a two-year grant. The State of St. Louis Foundation served as fiscal agent.		
Nonprofit Consortium To provide scholarships to arts organizations interested in attending the grantee's conference on nonprofit leadership.		

TOTAL OTHER GRANTS

TOTAL GRANTS

FINANCIAL STATEMENTS
As of and for the year ended April 30, 2000

2000

STATEMENT OF FINANCIAL POSITION

Assets	
Cash and Cash Equivalents	\$ 921,914
Investments at Market Value	38,909,834
Interest Receivable	88,174
Prepaid Excise Tax	48,359
Other Assets	5,645
Total Assets	\$ 39,973,926
Liabilities	
Accounts Payable and Accrued Expenses	\$ 8,168
Grants Payable	1,963,413
Total Liabilities	1,971,581
Net Assets	
Unrestricted Net Assets	38,002,345
Total Liabilities and Net Assets	\$ 39,973,926

STATEMENT OF ACTIVITIES

Revenue	
Interest and Dividends, Net of Investment Expenses	\$ 848,371
Realized and Unrealized Gains on Investments	3,693,943
Other Revenue	4,274
Total Revenue	4,546,588
Expenses	
Charitable Grants and Program Expenses	2,580,479
Grant Administration	64,633
Excise Tax	59,072
Total Expenses	2,704,184
Increase in Unrestricted Net Assets	1,842,404
Net Assets at Beginning of Year	36,159,941
Net Assets at End of Year	\$ 38,002,345

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.

FINANCIAL STATEMENTS
As of and for the year ended April 30, 2001

2001

STATEMENT OF FINANCIAL POSITION

Assets	
Cash and Cash Equivalents	\$ 951,147
Investments at Market Value	32,714,772
Interest Receivable	80,887
Prepaid Excise Tax	26,466
Equipment and Leasehold Improvements, Net	28,514
Other Assets	5,588
Total Assets	\$ 33,807,374
Liabilities	
Accounts Payable and Accrued Expenses	\$ 8,168
Grants Payable	1,905,410
Total Liabilities	1,913,578
Net Assets	
Unrestricted Net Assets	31,893,796
Total Liabilities and Net Assets	\$ 33,807,374

STATEMENT OF ACTIVITIES

Revenue	
Interest and Dividends, Net of Investment Expenses	\$ 865,748
Net Realized and Unrealized Losses on Investments	(4,820,316)
Net Investment Loss	(3,954,568)
Expenses	
Charitable Grants and Program Expenses	2,059,432
Grant Administration	72,656
Excise Tax	21,893
Total Expenses	2,153,981
Decrease in Unrestricted Net Assets	(6,108,549)
Net Assets at Beginning of Year	38,002,345
Net Assets at End of Year	\$ 31,893,796

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. Applicants must contact the Foundation before submitting a full proposal.

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;
- 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, 308 N. 21st Street, Suite 400, St. Louis, Missouri 63103. Our telephone number is (314)241-4352.

T R U S T E E S

Melvin F. Brown
John Capps
Donald P. Gallop
Laurna C. Godwin
Dudley R. Grove

S T A F F

Christy E. Gray, Executive Director
Elizabeth C. Kellerman, Administrative Assistant

A D D R E S S

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**WHITAKER FOUNDATION
308 N. 21ST STREET
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ST. LOUIS, MO 63103**

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