

MISSOURI RETIRED TEACHERS ASSOCIATION FOUNDATION



Annual Report 2023

*In partnership with the
Missouri Retired Teachers Association and Public School Personnel (MRTA)*

3030 DuPont Circle, Jefferson City, MO 65109
(573) 634-4300
www.mortf.org

Responsibility + Gratitude + Generosity = Thriving

Letter from the Foundation Board President



Dear MRTA Members, Corporate Sponsors, and Donors:

The Missouri Retired Teachers Association Foundation (MRTF) is a tax exempt 501(c)(3) charitable corporation devoted to raising funds to carry out certain charitable and educational purposes of the Missouri Retired Teachers Association and Public School Personnel (MRTA). Since being approved by the MRTA Board of Directors, the Internal Revenue Service, and the Missouri Department of Revenue, the Foundation has had as its motto, "Honoring the Past and Giving to the Future."

The Foundation is young as it was established in 2001. Its first project, partnering with MRTA, was to pay for and build a permanent office building (\$795,000) to house both organizations. The ribbon cutting was held in 2009, and the mortgage was burned in 2012. The second project was to pay for and install an elevator (\$107,000) in the building to help some of our members, which was completed and paid for in one year (2014).

The Foundation maintains three major fundraising activities: the \$10,000 Raffle, the Silent Auction at the MRTA Annual Meeting, and the Year-End Ask Letters. MRTF also receives donated travel reimbursement expenses from MRTA members. Additionally, MRTA members can buy mailing labels for MRTA and MRTF by calling the office, can donate their PSRS Death Benefit, AND can just make a donation. MRTF receives donations from hundreds of MRTA members who give very generously to promote the mission of the Missouri Retired Teachers Foundation.

The CLASSROOM GRANT PROGRAM continues to be the emphasis for our fundraising efforts. The number of grants has increased significantly from 20 grants in 2011 to 126 grants in 2022, or approximately nine grants in each of MRTA's 14 regions. In 2020, MRTF received a bequest of \$5,000 from the estate of former MRTA President, Maggie Elder. Maggie was a PEER's member; the only MRTA President to represent support staff so far. MRTF used that bequest to establish the Maggie Elder Memorial PEERS/Support Staff Grant Program. We offered 20 \$500 grants to public school support staff across the state. In 2022, MRTF also awarded a total of 126 \$500 grants to the public school employees in the State of Missouri. The value of both these grants totaled \$73,000!! **Since 2011, YOUR MRTF has awarded \$611,000 in scholarships and grants back to current Missouri public school employees!!!**

As President of the Missouri Retired Teachers Foundation, I want to offer my sincere thanks to everyone who made a donation to MRTF since 2001. By donating, you leave a legacy and create a memory that will endure.

THANK YOU SO VERY MUCH!

Respectfully submitted,

A handwritten signature in black ink that reads "Karen Miller". The signature is written in a cursive, flowing style.

Karen Miller, MRTF President

Honoring the past and giving to the future

MRTF Board of Directors

Board Members

Karen Miller, President, Ozark, MO

John Poston, Vice President, Bonne Terre, MO

Jenifer Young, Secretary, Clever, MO

Mary Ridge, Treasurer, Sturgeon, MO

Velma Bailey, St. Louis, MO

Sandy Berry, St. Louis, MO

Arleta Godwin, Montrose, MO

Linda Holt, Nixa, MO

Marlin Kinman, Ravenwood, MO

Mark Lueckenhoff, Ewing, MO

John Moyer, Kennett, MO

Vicki Orr, Monett, MO

Jan Powers, Warrensburg, MO

Fred Price, Lee's Summit, MO

Margaret Smith, Troy, MO

Pam Waterman, Blue Springs, MO

Linda Orscheln, Bonnots Mill, MO

Dan Eckard, Warrensburg, MO

Committed to Excellence

The Missouri Retired Teachers Association Foundation (MRTF) is a tax-exempt 501(c)(3) not-for-profit corporation devoted to raising donations to carry out certain charitable and educational purposes of the Missouri Retired Teachers Association and Public School Personnel (MRTA), including the following:

- To educate members of MRTA and the public about the purpose and function of the Foundation.
- To award grants and/or scholarships to active classroom teachers to enhance their classroom instruction and to active school support staff to provide resources to ensure a safer and more supportive learning environment for students.
- To receive and hold by gift, grant, assignment, transfer devise or bequest either absolutely or in trust, any property, real, personal or mixed, without limitation as to amount or value except as may be imposed by law; provided, however, that no part of the net earnings of this foundation shall inure to the benefit of any officer or director, and provided further that no substantial part of the corporation's activities shall involve political campaigning, lobbying, or otherwise attempting to influence legislation.
- To perform other humanitarian endeavors and functions consistent with the Foundation's Bylaws and Articles of Incorporation as approved by the Foundation's Board of Directors.

Honoring the past and giving to the future



Donations to the Foundation

The Missouri Retired Teachers Association Foundation (MRTF) was created in 2001 by the Executive Board of the Missouri Retired Teachers Association and Public School Personnel (MRTA) as a not-for-profit organization incorporated under the State of Missouri and approved by the Internal Revenue Service as a 501(c)(3) public charity. As such, contributions and gifts to the Foundation from individuals, corporate sponsors, associations, and other organizations are tax deductible from both income and estate taxes.

Ways to Give to the Foundation

- Designation of your Public School Retirement System (PSRS) \$5,000 Death Benefit to MRTF
- Naming MRTF in your will or trust
- Tithe (10%) on the Missouri Public Pension Exemption
- Create an individual or family endowment to MRTF
- Donate to one of the following MRTF Fund Categories:
 - Grant Fund
 - Endowment Fund
 - Building Fund
 - General Fund
- Participate in MRTF's Annual Fundraising Campaigns:
 - MRTF \$10,000 Raffle
 - Silent Auction at the MRTA Annual Fall Meeting
 - Year-End Ask Letter Campaign
- Donate anytime safely and securely online at www.mortf.org

They need YOU now more than ever. Tax deductible donations to the Missouri Retired Teachers Foundation will be acknowledged.

	Missouri Retired Teachers Foundation 3030 DuPont Circle Jefferson City, MO 65109	
Name _____ Email Address _____		
Address _____ City _____ State _____ Zip _____		
Enclosed is my tax deductible donation to MRTF: \$25 _____ \$50 _____ Other \$ _____		
I wish for my donation to go to the following: Grant Fund _____ Endowment Fund _____ General Fund _____		
Please make checks payable to MRTF.		
To donate by credit card please choose type: Visa _____ MasterCard _____ Discover _____ American Express _____		
Card Number _____ - _____ - _____ Exp. Date _____ / _____		
Authorizing Signature _____ Name on Card (Please Print) _____		

Mail to MRTF at 3030 DuPont Circle, Jefferson City, MO 65109.

Honoring the past and giving to the future

MRTF Fund Categories

MRTF EARMARKED FUNDS

Grant Fund

The Grant Fund encompasses the Classroom Grant Program and the Maggie Elder Memorial PEERS/Support Staff Grant Program. The Classroom Grant Program advances and enhances the status of the teaching profession in Missouri by awarding active classroom teachers in Missouri. The Maggie Elder Memorial PEERS/Support Staff Grant Program was created to assist PEERS members/support staff (bus drivers, cooks, secretaries, paraprofessionals, nurses, etc.) with providing resources for their students and schools to ensure a safer and more supportive learning environment.

As funding to schools continues to be cut, the demand for classroom supplies and support for school projects continues to increase. These grants have become more competitive over the years as more schools learn about the grant programs. MRTF's grant programs are just one way the Foundation can make an impact on the education of Missouri students and assist classrooms, students, and support staff.

Endowment Fund

The Endowment Fund was created in 2010 to provide opportunity for donors to leave a legacy. In 2012, the Foundation Board of Directors voted to open an investment account with Community Foundation of the Ozarks (CFO). CFO is a not-for-profit foundation devoted in part to providing a vehicle in which smaller foundations may pool their funds to improve their return on investments. "By giving, you leave a legacy; you create a memory that will not fade."

Building Fund

The Foundation Board of Directors successfully raised funds to construct an office facility to carry out the missions of the Foundation and Association. In 2012, the mortgage was retired for the new office classroom facility. Board action in 2013 marked the beginning of fundraising activities to install an elevator within the building. Installation of the elevator was completed in and paid in full by late May 2014. Now that the elevator campaign is complete, the Board has elected to start replenishing this fund for future major repairs or renovations.

MRTF NON-EARMARKED FUNDS

General Fund

Nonearmarked contributions are used to pay operating expenses and to fund activities and service projects of the Foundation.

Fundraising Activities

During 2023, income for the Foundation totaled \$110,474.14. Fundraising was focused mainly on raising money for the Grant Fund to operate the Foundation's Classroom Grant Program and Maggie Elder Memorial PEERS/Support Staff Grant Program. Donations to the Grant Fund totaled \$26,936.98 while the Building Maintenance/Improvement Fund reached \$4,164.56. Donations were also earmarked for the Endowment Fund at \$6,993.59 and non earmarked for the General Fund at \$17,555.46.

The Foundation typically holds three major fundraising campaigns each year. The *MRTF \$10,000 Raffle*, which is held in the spring, brought in \$40,785 in donations from 637 donors in 2023. The *MRTF Silent Auction* fundraiser, which was held at the MRTA Annual Meeting in September, collected \$12,694.50. The last fundraiser of the year was the *Year-End Ask Letter Campaign*. The MRTF Office mailed letters to past donors, MRTA members, and corporate sponsors. The campaign brought in \$35,925.01 in donations from over 283 donors.

For the year, the Foundation benefited from one \$5,000 death benefits from the Public School Retirement System. MRTA members also donated \$6,511.74 of their meeting travel reimbursement expenses to the Foundation. Miscellaneous donations made up the balance of the donations for the year. Thank you to the more than 422 donors who gave so generously to promote the mission of the Missouri Retired Teachers Foundation.

Grant Programs

Since the inception of the Foundation's two grant programs, the Foundation has received 3,537 Classroom Grant Program applications and 225 Maggie Elder Memorial PEERS/Support Staff Grant Program applications. 1,035 applicants have been awarded \$500 Classroom Grants, totaling \$518,500 and 69 applicants have been awarded \$500 PEERS/Support Staff Grants, totaling \$34,500.

The Classroom Grant Program has been the Foundation's main focus since 2009 when they decided to stop awarding scholarships. In 2020, the Foundation added a second grant program, the Maggie Elder Memorial PEERS/Support Staff Grant Program, to assist public education personnel outside of classroom teachers. These grants are just one way the Foundation can make an impact on the education of Missouri students, encourage classroom teachers, and support public education personnel.

The Classroom Grant Selection Committee included 14 Missouri Retired Teachers Association (MRTA) Regional Vice Presidents and their Regional Committees. The committee reviewed 424 applications and selected grant winners from each of the 14 MRTA regions. 154 applicants were selected to receive \$500 grants for the year.

The PEERS Grant Selection Committee included all MRTF Board Members and MRTA's Regional Vice Presidents. The committee reviewed 82 applications and selected 14 - \$500 grant winners from all over the state.

Honoring the past and giving to the future

Classroom Grant Winners

In 2023, there were 126 Classroom Grants awarded in MRTA's 14 regions. These grants assist active classroom teachers in enhancing their classroom instruction.

Region	First Name	Last Name	School District	County	School Name
1	Angela	Davison	North Nodaway R-VI	Nodaway	North Nodaway Elementary School
1	Lori	Keller	Stewartsville C-2	Dekalb	Stewartsville Elementary School
1	Heidi	Komorech	Nodaway Holt R-VII	Nodaway	Nodaway Holt Elementary School
1	Stacy	Mason	Jefferson C-123	Nodaway	Jefferson Elementary School
1	Erin	Peters	Cowgill R-VI	Caldwell	Cowgill Elementary School
1	Kalen	Prothero	Hamilton R-II	Caldwell	Penney High School
1	Kati	Smith	Hamilton R-II	Caldwell	Hamilton Elementary School
1	Jennifer	Stoll	Maryville R-II	Nodaway	Eugene Field Elementary School
1	Mindy	Yoakum	Cowgill R-VI	Caldwell	Cowgill Elementary School

Region	First Name	Last Name	School District	County	School Name
2	Amanda	Crosby	Belton School District #124	Cass	Cambridge Elementary School
2	Peggy	Jones	Raymore-Peculiar R-II	Cass	Bridle Ridge Elementary School
2	Allison	Lundquist	Oak Grove R-VI	Jackson	Oak Grove Primary School
2	David	Mayne	Lawson R-XIV	Ray	Lawson High School
2	Cindi	McCumber	Blue Springs R-IV	Jackson	Thomas Ultican Elementary School
2	Vivian	McKinney	Raytown C-2	Jackson	Raytown High School
2	Melissa	Potter	Park Hill School District	Platte	Prairie Point Elementary School
2	Sarah	Vanzandt	Fort Osage R-I	Jackson	Woodland Early Childhood Center
2	Melinda	Young	Raymore-Peculiar R-II	Cass	Raymore-Peculiar East Middle School

Region	First Name	Last Name	School District	County	School Name
3	Teresa	Dolan	Green City R-I	Sullivan	Green City Elementary School
3	Wendy	Eberhardt	Green City R-I	Sullivan	Green City High School
3	Marta	Gall	Macon R-IV	Macon	Macon County High School
3	Danielle	Garrett	Kirksville R-III	Adair	William Mathew Middle School
3	Erin	McAlvany	Kirksville R-III	Adair	Kirksville High School
3	Whitney	Orr	Brookfield R-III	Linn	Brookfield Elementary School
3	Tracy	Vorkink	Kirksville R-III	Adair	Kirksville High School
3	Samantha	Waugh	Putnam R-I	Putnam	Putnam County Elementary School
3	Suzanne	Young	Marceline R-V	Linn	Walt Disney Elementary School

Region	First Name	Last Name	School District	County	School Name
4	Candance	Campbell	Community R-VI	Audrain	Community R-6 Elementary School
4	Katie	Dunne	Columbia	Boone	Hickman High School
4	Margaret	Frazier	Mexico 59	Audrain	McMillan Early Learning Center
4	Kateryna	Hennes	Montgomery R-II	Montgomery	Montgomery City Elementary School
4	Sharon	Horton	Southern Boone R-I	Boone	Southern Boone Elementary School
4	Whitney	Lewis	Mexico 59	Audrain	Eugene Field Elementary School
4	Maggie	Resa	Mexico 59	Audrain	McMillan Early Learning Center
4	Kayli	Roberts	Higbee R-VIII	Randolph	Higbee Middle School
4	Christine	Schremp	Mexico 59	Audrain	McMillan Early Learning Center

Region	First Name	Last Name	School District	County	School Name
5	Jodie	Chrislaw	Boonville R-I	Cooper	Hannah Cole Primary School
5	Christa	Bell	Lafayette C-1	Lafayette	Lafayette Middle School
5	Anja	Comerford	Warrensburg R-VI	Johnson	Warrensburg Middle School
5	Theresa	Fuemmeler	Glasgow R-II	Howard	Glasgow Elementary School
5	Jodie	Hinnen	Tina-Avalon R-II	Carroll	Tina-Avalon School
5	Taylor	Murnahan	Lafayette C-1	Lafayette	Lafayette High School
5	Michelle	Ray	Tina-Avalon R-II	Carroll	Tina-Avalon School
5	Katie	Ritter	Warrensburg R-VI	Johnson	Ridge View Elementary School
5	Stephany	Russell	Brunswick R-II	Chariton	Brunswick R-II School

Honoring the past and giving to the future

Classroom Grant Winners

Region	First Name	Last Name	School District	County	School Name
6	Janet	Conner	Warsaw R-IX	Benton	John Boise Middle School
6	Cassidy	Cooper	Montrose R-XIV	Henry	Montrose R-XIV School
6	Halea	McAtee	Hermitage R-IV	Hickory	Hermitage Elementary School
6	Becky	Neuenschwander	Lakeland R-III	St. Clair	Lakeland Elementary School
6	Melissa	Payne	NEVC R-I	Vernon	Northeast Vernon County Central Office
6	Allyson	Richardson	Warsaw R-IX	Benton	Warsaw North Elementary School
6	Linda	Schlueter	Appleton City R-II	St. Clair	Appleton City R-II
6	Katherine	Tabor	Northeast Vernon R-I	Vernon	NEVC High School
6	Kari	Winters	Warsaw R-IX	Benton	John Boise Middle School

Region	First Name	Last Name	School District	County	School Name
7	Gidget	Brothers	Swedeborg R-III	Pulaski	Swedeborg Elementary School
7	Ruth	Diaz	Rolla 31	Phelps	Rolla Technical Center
7	Joni	Fields	Climax Springs R-IV	Camden	Climax Springs High School
7	Samantha	Francis	Osage R-II	Osage	Linn High School
7	Kristen	Kloepfel	Dixon R-I	Pulaski	Dixon High School
7	Casey	Kotschedoff	Rolla 31	Phelps	Rolla Jr. High School
7	Melinda	Rector	Phelps R-III	Phelps	Edgar Springs School
7	Jodi	Tompkins	School of the Osage	Miller	Osage Middle School
7	Jessika	Zink	Rolla 31	Phelps	Rolla Middle School

Region	First Name	Last Name	School District	County	School Name
8	Jenna	Becker	SSD	SSD	Mehlville Early Childhood
8	Daniele	Cerone-Griffin	SSD	SSD	SSD County Wide Instruction
8	Melissa	Clute	Hillsboro R-III	Jefferson	Hillsboro Primary School
8	Emily	Baker	Maplewood, Richmond Heights	SSD	Maplewood Richmond Heights High School
8	Patricia	Goeke	Kirkwood R-VII	SSD	Nipher Middle School
8	Caralyn	Harman	Northwest R-I	Jefferson	Northwest High School
8	Shelley	Miles	Meramec Valley R-III	Franklin	Riverbend Middle School
8	Christina	Monolo	SSD	SSD	Neuwoehner School
8	Sarah	Turner	Northwest R-I	Jefferson	High Ridge Elementary School

Region	First Name	Last Name	School District	County	School Name
9	Megan	Allison	Lockwood R-I	Dade	Lockwood Elementary School
9	David	Brown	Aurora R-8	Lawrence	Robinson Elementary School
9	Erica	Doennig	Joplin Schools	Jasper	Irving Elementary School
9	Sheri	Guesby	Seneca R-VII	Newton	Seneca Early Childhood
9	Amy	Harkey	Purdy R-II	Barry	Purdy High School
9	Jenny	Houk	Neosho R-V	Newton	Neosho Middle School
9	Melissa	Oates	Diamond R-IV	Newton	Diamond High School
9	Amy	Sampson	Monett R-I	Barry	Monett High School
9	Jennifer	Shook	Verona R-VII	Lawrence	Verona R-7 Junior High

Region	First Name	Last Name	School District	County	School Name
10	Vanessa	Bates	Forsyth R-III	Taney	Forsyth Elementary School
10	Hannah	Bray	Spokane R-VII	Christian	Highlandville Elementary School
10	Ally	Clemans	Bradleyville R-I	Taney	Bradleyville R-I School
10	Jody	Dalton	Ozark R-VI	Christian	Ozark Junior High
10	John	Giebler	Reed Springs R-IV	Stone	Gibson Technical Center
10	Cindy	Hailey	Ava R-I	Douglas	Ava Elementary School
10	Montye	Mickelson	Forsyth R-III	Taney	Forsyth Middle School
10	Shawn	Saylor	Ozark R-VI	Christian	Ozark High School
10	Shelby	Starkebaum	Bradleyville R-I	Taney	Bradleyville R-I School

Honoring the past and giving to the future

Classroom Grant Winners

Region	First Name	Last Name	School District	County	School Name
11	Leah	Conaway	Iron County C-4	Iron	Iron County C-4 Elementary School
11	Kristen	Harris	North St. Francois R-I	St.Francis	North County Intermediate School
11	Brandon	Hopkins	Woodland R-IV	Bollinger	Woodland Elementary School
11	Kelly	Linck	Central R-III	St.Francis	Central Elementary School
11	Traci	Roemer	Ste. Genevieve R-II	Ste. Genevieve	Ste. Genevieve High School
11	Jennifer	Sikes	Mineral Area	St.Francis	Mineral Area College Early Learning Academy
11	Stephanie	Sulser	Ste. Genevieve R-II	Ste. Genevieve	Ste. Genevieve Elementary School
11	Loree	Walker	North St. Francois R-I	St.Francis	North County Intermediate School
11	Sarah	Wolfe	Bismarck R-V	St.Francis	Bismarck Elementary School

Region	First Name	Last Name	School District	County	School Name
12	Amber	Beard	Jackson R-II	Cape Girardeau	Jackson Middle School
12	Shantel	Caruso	Alton	Oregon	Alton Elementary School
12	Kristin	Crawford	Bloomfield R-14	Stoddard	Bloomfield High School
12	Heather	Dollins	Neelyville R-IV	Butler	Neelyville Elementary School
12	Robyn	Frye	Oak Ridge R-VI	Cape Girardeau	Oak Ridge Elementary School
12	Bryce	Peacock	District 63	Cape Girardeau	Blanchard Elementary School
12	Katie	Stagner	Cape Girardeau 63	Cape Girardeau	Jefferson Elementary School
12	Hilary	Taylor	Poplar Bluff R-I	Butler	Poplar Bluff Junior High
12	Rebeka	Wright	Cape Girardeau 63	Cape Girardeau	Central Middle School

Region	First Name	Last Name	School District	County	School Name
13	Meredith	Adam	Lincoln R-3	Lincoln	Troy Buchanan High School
13	Tina	Berra	Troy R-3	Lincoln	Troy Buchanan High School
13	Jenna	Casey	Warren R-III	Warren	Warrior Ridge Elementary School
13	Heather	Dildine	Troy R-3	Lincoln	Troy South Middle School
13	Christy	Flake	Warrant R-3	Warren	Warrior Ridge Elementary School
13	Kathleen	Forbes	Lincoln R-3	Lincoln	Winfield High School
13	Angela	Maier	Bowling Green R-I	Pike	Bowling Green Elementary School
13	Meredith	Martinson	Louisiana R-II	Pike	Louisiana Elementary School
13	Rebecca	Waychoff	Francis Howell	St.Charles	Castilio Elementary School

Region	First Name	Last Name	School District	County	School Name
14	Clementine	Carbery	SSD	Ferguson-Florissant R-II	Griffith Intermediate School
14	Trina	Cornell	Pattonville R-III	St. Louis	Holman Middle School
14	Nicole	Dye	Pattonville R-III	St. Louis	Drummond Elementary School
14	Kristen	Hagemeier	Pattonville R-III	St.Louis	Holman Middle School
14	Michelle	Haupt	Pattonville R-III	St.Louis	Willow Brook Elementary School
14	Kathryn	Leonard	Pattonville R-III	St.Louis	Parkwood Elementary School
14	Cynthia	Myers	SSD	Ferguson-Florissant R-II	Ferguson Middle School
14	Jackie	Ramey	Pattonville R-III	St.Louis	Holman Middle School
14	Lindsay	Williams	Pattonville R-III	Pattonville	Drummond Elementary School

Honoring the past and giving to the future

PEERS/Support Staff Grant Winners

In 2023, there were fourteen Maggie Elder Memorial PEERS/Support Staff Grants awarded throughout the state. These grants assist active school support staff to provide resources to ensure a safer and more supportive learning environment.

Region	First Name	Last Name	School District	School Name
1	Toi	Cox	Cowgill R-VI	Cowgill Elementary School
1	Rachelle	Weller	South Harrison R-II	South Harrison Early Childhood Special Education Center
2	Jean	Hwang	Blue Springs R-IV	Liggett Trail Education Center
2	Shelley	McCullough	Archie R-V	Archie School
3	Stacie	Hudson	Kirkville R-III	Early Childhood Learning Center
3	Suzanne	Sizemore	Kirkville R-III	Kirkville High School
4	Melanie	Addie	Mexico 59	McMillan Early Learning Center
4	Kathy	Miller	Fulton 58	Bartley Elementary School
5	Patricia	Heugel	Lafayette C-1	Lafayette Middle and High School
5	Candice	Stallo	Salisbury R-4	Salisbury Elementary School
6	Felicia	Foster	Montrose R-XIV	Montrose R-XIV School
6	Kayla	Woirhaye	Clinton School District	Clinton Intermediate School
7	Tracy	Bragg	Rolla 31	Rolla Jr. High School
7	Nicole	Shuman	Morgan R-II	Versailles Elementary School
8	Mary	Glosemeyer	Washington	Marthasville Elementary School
8	Tashia	Nelson	Kirkwood R-VII	Kirkwood High School
9	Rachael	Dunbar	Neosho R-V	RISE Elementary School
9	April	Jones	Sarcoxie R-II	Wildwood Elementary School
10	Wendy	Brooke	Ava R-I	Ava Public School
10	James	Heath	Ava R-I	Ava Elementary School
11	Melissa	Gidden	West St. Francois R-IV	West County Middle School
11	Brian	Whitfield	North St. Francois R-I	North Parkside/Intermediate/ Middle School
12	Bonnie	Clark	Dexter R-XI	Southwest Elementary School
12	Morgan	Loesel	Jackson R-II	West Lane Elementary School
13	Carri	Allred	Lincoln R-3	Troy Middle School
13	Amy	Biggs	Bowling Green R-I	Bowling Green Elementary School

Honoring the past and giving to the future

Grant Winners



Vivian McKinney, Region 2



Megan Allison, Region 9



Clementine Carbery, Region 14

Carrying out certain charitable and educational purposes of the Missouri Retired Teachers Association.

Partnership with MRTA

The Missouri Retired Teachers Association and Public School Personnel (MRTA) was organized in December 1960 by a group of 11 retired teachers meeting in Jefferson City, Missouri, at the Governor Hotel. The five school system areas represented were St. Louis City, St. Louis County, Columbia, Lebanon, and Springfield.

MRTA's vision is to secure Missouri education retirement systems based upon strong advocacy for public schools.

The Missouri Retired Teachers Association Foundation (MRTF) was created in 2001 by the MRTA Executive Board and is the philanthropic arm of MRTA as a not-for-profit organization incorporated as a 501(c)(3) public charity.

MRTF and MRTA work in partnership for the active classroom teachers and active school support staff, supporting public education.



Honoring the past and giving to the future

Leaving a Legacy at MRTF

The Foundation Board has established a uniform system that recognizes all contributors. The Foundation's levels of giving for individuals, MRTA local units and regions, and corporations are as follows:

Foundation's Levels of Giving

- Legacy \$5,000 and Higher
- Founder \$2,500 to \$4,999
- Benefactor \$1,000 to \$2,499
- Shareholder \$500 to \$999
- Partner \$200 to \$499
- Friend \$1 to \$199

All contributors are acknowledged and a note of appreciation is sent to the donor upon receipt of a contribution to the Foundation. In past Foundation Annual Reports, all contributions were listed individually by levels of giving for the current year. As the number of donors has increased over the years, printing the donors' names for all levels of giving is cumbersome. In order to keep the cost of printing the Annual Report to a minimum, the names printed in this publication will be of donors whose 2023 donations were greater than \$200. For those donors in the Friend Level (\$1 to \$199) for 2023, we applaud each. 366 Friends gave an average of \$62.45. No donation is too small! The Foundation Board also wishes to recognize all contributors who have reached the Legacy Level. Thank you!

Donors are encouraged to continue their giving even after they reach the Legacy Level (\$5,000 or greater). Once there, they are recognized with a slide in the Legacy Promises Kept donor recognition. To date, 70 donors have reached the Legacy giving level.

In addition to Legacy Promises Kept, there is a second Legacy recognition arrangement available to donors - Legacy Promises Made. Donors who have notified the Foundation Office that they have named the Missouri Retired Teachers Foundation as the beneficiary of their PSRS \$5,000 death benefit are recognized with a slide in the Legacy Promises Made donor recognition.

Every effort has been made to ensure accuracy; however, if your name has been omitted, misspelled, or misplaced, please accept the Foundation and staff's sincere apologies and notify the MRTF Office to correct the donor files.

2023 Contributions

This list contains the names of donors, who in the 2023 calendar year, gave monetary donations totaling \$200 or more. We wish to thank each and every person who gave to the Foundation to support its mission.

Legacy Level (\$5,000+)

Missouri Retired Teachers Association

Founder Level (\$2,500-\$4,999)

Darleen Barnes
Mary Ridge
Maria & Steve Walden

Benefactor Level (\$1,000-\$2,499)

Stephen Hutt
Phyllis & Gary McElhinney
Jan Powers
Martha Schatz
Mr. & Mrs. Joseph Vogt

Shareholder Level (\$500-\$999)

Ann Bachelor	Culah Nixon	Christian County RSP
Sally Bocklage	Ina Carol O'Neal	The Giving Tree
Bill & Sheree Borcharding	John & Elizabeth Poston	
Sherry Brandes	Vicki Stewart	
Linda Holt	Mona & Larry J Tyrl	
Arleta & Phil Godwin	Idella Warden	
Janice Loudenslager	Blue Springs REA	

Partner Level (\$200-\$499)

Ann Bachelor	Gale & Carolyn Hairston	Culah Nixon	Sunni Rae Wilson
Sally Bocklage	Sue Heimburger	Ina Carol O'Neal	Barry County RSP
Bill & Sheree Borcharding	Sandra Hografe	Vicki Orr	Blue Springs REA
Evelyn Brown	Jerry & Judith Hudson	John & Judith Pohl	Boone County RT & PA
Carolyn Cooling	Pam Jones	Gail & Ed Roberts	Cole Co Area RTA
Sandra & Jerry Cooper	Marlin & Trudy Kinman	Sherry Rouner	Daniel Boone Area Unit
Sharyn Dinwiddie	Benny Lawson	Barbara Schaefer	Grandview RSP
Dan Eckard	Janice Loudenslager	Marilyn Skipper	Kirkville Area RSP
Cheryl Fye	Joalyn McKenney	Margaret Smith	Maries-Gasconade Unit
Betty Green	Karen Miller	Susan Taylor	National Financial Services
Sue Groves	Mary Newcomb	John & Patsy Watt	LLC

Honoring the past and giving to the future

2001-2023 Legacy Level Donors

The Foundation wishes to recognize all Legacy Level donors since the inception of the Foundation. Listed below are the Legacy Level donors, who through their generosity, have given \$5,000 or more since 2001.

Individual Legacy Level Donors

Rosemary Bane	Leonard & Sherie Marek
Darleen Barnes	Phyllis & Gary McElhinney
Laura Barr	Gloria McLerran
Betty Beal	Eve McNew
Kittie Blankenship	Karen Miller
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Marion Brooks	Ruth Hubert Morris
Marjorie Brown-Yokley	John & Anne Moyer
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Richard Flanagan	Mary Ridge
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Neva Johnson	Josephine Williams
Jim & Debbie Kreider	Naomi R Williams
Margery Kuhler	Mary Wyss
Ruth Lamborn	

Corporate Legacy Level Donors

Anheuser Busch	Cole Co Area RTA
AQR Capital Management LLC	Drury Hotels
Aronson+Johnson+Ortiz, LP	Enterprise Rent-A-Car Foundation
Artio Global Investors	Forrest T Jones & Company
Boone County RT & PA	Missouri Retired Teachers Association
Bridgewater Associates, LP	Westwood Management Corporation
CIM GROUP, LLC DE	

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Cumulative Donations

If you wish to know your cumulative donations since 2001, please call the Foundation Office toll-free at 1-877-366-6782, or you can go online at www.mortf.org. Your generosity over the years is greatly appreciated. Thank you!

By giving, you leave a legacy; you create a memory that will not fade.

Office Facility Photographs



Picture of MRTF Building at Night



Flagpole and Patio



MRTA/MRTF - Marquee Sign



The Classroom and Learning Center

Honoring the past and giving to the future

2023 Financial Reports

9:11 AM

Missouri Retired Teachers Foundation

09/05/24

Balance Sheet

Accrual Basis

As of December 31, 2023

	<u>Dec 31, 23</u>
ASSETS	
Current Assets	
Checking/Savings	
10000 · Jefferson Bank GrantScholarship	7,022.39
10100 · Central Bank General Revenue	104,720.94
10200 · Central Bank Endowment Fund	21,550.25
10350 · Central Bank Building Fund	8,334.34
10360 · Hawthorn Bank CD - Building	46,005.03
10370 · Hawthorn Bank CD - Gen Rev	102,233.40
10400 · Comm Fndtn of Ozarks End. Invst	83,038.25
10500 · Comm Fndtn Ozarks Irr. End. Inv	20,384.60
Total Checking/Savings	<u>393,289.20</u>
Total Current Assets	393,289.20
Fixed Assets	
15100 · Building	883,080.16
15101 · Land	140,000.00
15102 · Equipment & Furnishings	51,530.82
15110 · Accumulated Depreciation	-324,600.18
Total Fixed Assets	<u>750,010.80</u>
TOTAL ASSETS	<u><u>1,143,300.00</u></u>
LIABILITIES & EQUITY	
Equity	
30000 · Opening Balance Equity	487,132.30
31300 · Perm. Restricted Net Assets	18,554.49
31500 · Temp. Restricted Net Assets	68,387.02
32000 · Unrestricted Net Assets	602,012.96
Net Income	-32,786.77
Total Equity	<u>1,143,300.00</u>
TOTAL LIABILITIES & EQUITY	<u><u>1,143,300.00</u></u>