



PATTERSON · FAMILY FOUNDATION



2021

ANNUAL REPORT



On cover: "Papa Karl" Schuele of Atchison, Kansas shows off a chick from his farm.
Photo credit: Denise Schuele

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LETTER FROM THE PRESIDENT

Doing only one thing doesn't really help, but you can't do them all, either.

That is where multi-year planning comes in. It will allow us to envision, build, and stack layers of programming over a period of years to achieve maximum impact.

**LINDSEY
PATTERSON
SMITH**



Following a wild pandemic year, 2021 was a time of transition and impact. It was a year of learning to function amid this "new normal" as we transitioned out of crisis mode and into a mindset of growing, building, and preparing for the future.

We had our biggest grantmaking year as we worked to understand the challenges and opportunities facing rural communities. Using insights gained in 2019 and 2020, we refined our informed opinion of the rural landscape. We began to formulate plans for how to make a measurable impact. We also focused on developing our team, processes, and tools as we prepare for the Foundation's next stage.

OUR WHY

The Patterson Family Foundation entered the rural space because that is where our family's heart is. Our cofounder and my father, Neal Patterson, was from a small agricultural community on the Kansas-Oklahoma border. He spent his formative years gaining the kind of practical education that can only be obtained on a working farm. In adulthood, he appreciated how much his agrarian upbringing had shaped the values that brought him success in his entrepreneurial endeavors. He believed in the people who share this heritage and knew they deserve the same opportunities taken for granted in non-rural settings.

While our motivation started with Neal and his connection to rural places and people, it continues for our own reasons. We see the complexity of the challenges facing the communities, and we see their great potential.

THE CHALLENGE

Low population density and geographic isolation are defining characteristics of rural communities. While important for supporting the U.S. agricultural system and a simpler way of life, these characteristics can make investment from the private sector look rough on paper.

Lack of investment leaves the people who live there without access to the things they need (health care, education, grocery stores) as well as the things they want (attractive amenities, parks, and entertainment). The math will probably never make sense for those looking for economies of scale, and so the pattern of underinvestment from private enterprises and public services will probably continue.

Underserved rural communities have the same challenges as underserved urban communities—and then some. As estimated in 2015 by the U.S. Economic Research Service, rural populations represent 20 percent of our nation's population but only receive six to seven percent of its philanthropic investment.

I'll say that again:

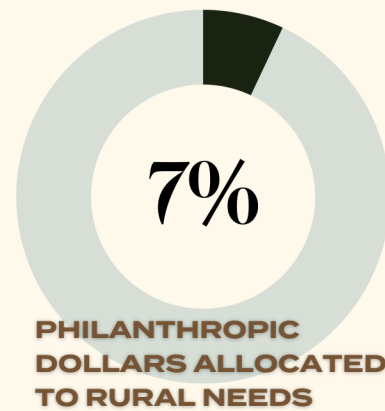
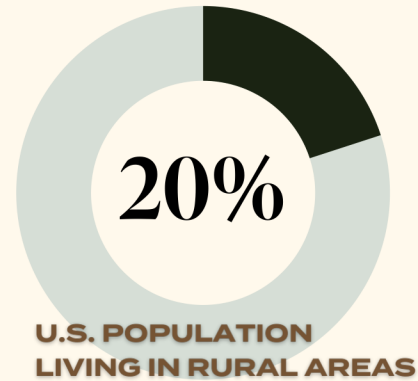
Rural communities represent 20% of our nation's population, but only receive 6-7% of its philanthropic dollars.

This means that these communities have the same problems but don't have the same backstop found in urban communities. When we see statistics like this, it reaffirms why it's important to do our work.

THE OPPORTUNITY

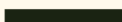
The challenges rural communities face are not new, nor are they unique to rural. But after decades of population shifts, an unfortunate new identity has formed for rural communities: "older, sicker, and poorer." While the data is clear, we know there is more to be said about the people and places which hold our hearts.

When we chose to focus on rural communities in 2019, their struggles seemed broadly under-discussed and under-appreciated. Maybe it's a case of recency bias, but we have noticed the predicament of rural communities receiving new light and urgency in the past couple of years. There is a growing understanding among public and philanthropic organizations working in rural communities that the time is ripe with opportunity for those ready to act.



We believe the Patterson Family Foundation can play a part in changing that narrative. We can intentionally invest philanthropic dollars, address systemic issues, and remove barriers.

As our work in Kansas and Western Missouri ramps up, we are witnessing an uncommon moment of opportunity for rural communities in the form of federal investments. The 2021 Infrastructure Investment and Jobs Act and the American Rescue Plan Act of 2021 are directing billions of dollars into rural communities via various infrastructure revitalization grants and relief funds. As federal investment comes down the pipe, we see an opportunity to make sure communities don't miss out on applying for those funds, for as long as the programs last.



2021 IN CONTEXT

Two-plus years ago, in 2019, we had a theory of how to approach our work but relatively little practical experience. The numerous, urgent needs of 2020 allowed us to test out many of our hypotheticals. Using the pandemic as a test case, in 2020, we designed, built, and executed our first homegrown programs that targeted specific issues. We began to develop local relationships and strengthen the organizational muscle, knowledge, and instincts we would need to serve rural communities. That progress continued into 2021, which became a year of "strength and conditioning" as well as a time to hone our approach.

The pandemic did not go away in 2021, but neither did the other needs of our communities. Throughout the year, we served numerous short-term needs while beginning to refocus our long-term goals and priorities. With active participation from our Board of Directors, this work continues.

We are proud to say that, in 2021, over 85% of our grants went to programs, services, and facilities designed to impact rural communities, and more than 50% were awarded directly to rural and micropolitan communities. This means our checks were written to and cashed by organizations in rural counties. These are exciting developments. We expect to continue to narrow our focus and ramp up rural investments in the years ahead.

INTERNAL GROWTH & DEVELOPMENT

A major focus of 2021 was building the organizational equivalent of our "minimum viable product" by developing the people, processes, and tools we need to achieve our charitable purpose and vision.

During the year, we awarded more than 600 grants with an average check size of \$36,000, effectively doubling our charitable spending from the previous year. Founder Neal believed that processes become obsolete when an organization doubles in size, a theory we proved in 2021. The increased level of activity allowed us to stress-test prior processes and tools, redesign current processes, and work out kinks before our grantmaking ramps up even further in the future. This "hardening" work occurs behind the scenes but is critical to ensuring a high-functioning organization.

Making grants directly to small organizations in rural communities has allowed us to grow in ways that can only happen when you get dirt under your nails. Our learning and growth is focused on the issues, their root causes, and the opportunities to address them. The work is ongoing and will always be in development, but we know more now than we did at the beginning of 2021. Not only do we have a refined view of rural challenges, but we have also developed a more confident view of how to make a difference. We have a better understanding of the environment, the players, the various approaches, and how to use relationships and processes to produce results.



The main conference room at our Plaza office location, where much of the magic happens.

During the year, we added three associates to the team, implemented a CRM and Grant Management software solution, designed program architecture and grant review processes, and found a new normal in hybrid remote work habits. We also worked on our governance and vision at the Board level. We met with numerous experts and stakeholders. We listened, asked questions, told our stories, shared our ideas, and listened some more.

On the ground, we delivered 608 grants to organizations in Kansas and Western Missouri, working on building stakeholder trust in the Patterson Family Foundation as an organization that acts quickly to make a difference.

WHAT'S NEXT

The last few years have been a great warm-up to our future. As our investment ramps up, it is necessary to create a roadmap for where we want to go. 2022 is the right time to develop a multi-year strategic framework to guide the next phase of our organization. One of the biggest challenges we face is what we affectionately refer to as the "rural riddle."

The challenges are so interconnected that a holistic approach is required to achieve a true synergistic impact. However, it is difficult to create a holistic impact without starting somewhere discrete. So where to start?

We cannot impact medical provider shortages via place-based incentives if there are not enough rural-minded individuals being recruited to medical schools in the first place. Similarly, we cannot recruit medical providers into communities that do not support their family's needs for housing, childcare, education, and a job opportunity for the spouse.

For any issue, there is so much to do. Doing only one thing doesn't really help, but you can't do them all, either. That is where multi-year planning comes in. It will allow us to envision, build, and stack layers of programming over a period of years to achieve maximum impact.



A DATA-INFORMED IMPACT

Given that complex needs exist in so many rural communities, we believe one way to gauge whether communities are finding the solutions they need is to monitor their vital signs. As we publish this report in 2022, we are working on developing a data-informed view of all our communities using a combination of historical data and future projections. This work began in 2021 as we explored analytical approaches and framed how we think about the characteristics of a community. What does it mean for a community to thrive?

To help answer that, we looked to subject matter experts, grantees, and each other. We connected with like-minded funders, each of whom had a distinct approach, and we gained a deeper understanding of the nuance. True to the nature of complex problems, the deeper we got, the more complicated the work seemed to become. We learned that, in some ways, thriving is in the eye of the beholder. But throughout, we have been able to hone our philosophy and our viewpoint of what ingredients help a rural community thrive.

Our exploration continues and is shaping into an interesting exercise in head vs. heart vs. gut reasoning. At the end of the day, we probably need to utilize all three to do our jobs well. As we have explored data, we have learned that the resilience, grit, and "can-do, make-do" attitudes which we so admire in these communities can conceal significant hidden needs. As we move forward, data will increasingly guide our top-down investments in communities via long-term, strategically focused programs.

CONCLUSION

For the Patterson Family Foundation, 2021 was a year of transition and impact. When we look back from the future, I believe it will stand out as the first year in which our results clearly spoke to our dedication to rural places and people. We did what we said we were here to do: support rural communities through funding opportunities and grantmaking. We built the team, hardened our processes, and laid the footing for the next stage of our Foundation—developing and delivering multi-year strategic impacts. We ended the year looking forward and ready to go!

Judsey



PATTERSON FAMILY FOUNDATION

OUR VISION

Thriving Rural Communities

OUR MISSION

Advancing health care, education, and strengthening communities, particularly in rural areas.

OUR STORY

Originally established by Neal and Jeanne in 2007 as a long-term asset management vehicle for charitable giving, investments, and other initiatives, the Foundation took on a new phase of existence after Neal and Jeanne passed away in 2017. Neal's estate plans included a provision to significantly fund the Foundation with a gift from the estate.

Neal and Jeanne's intent was for the Foundation, in combination with the Excolo Family Office, to play a strategic role in the lives of their children and descendants as well as the broader community.

They asked for the Foundation's giving to be strategic, to make a long-term sustainable difference, to focus on unmet needs in health care, education, and rural communities, and to do it in the entrepreneurial way that is so ingrained in the Patterson family. They acknowledged the broad scope of these areas, and they anticipated and supported a narrowing of focus.

In 2022, the Foundation continues to be governed by Neal's four adult children: Clay, Lindsey, Cortney, and Will, who comprise the Board of Directors. A small but growing Foundation staff shares workspace with the Excolo Family Office. Across the Board and staff, we work to make Neal and Jeanne proud while establishing new values and traditions unique to the current Board.



Neal and Jeanne Patterson

At the Patterson Family Foundation, we're not just from rural communities. We're for rural communities. We're a passionate team that is personally committed to improving the well-being and livelihood of the places we care about.

**OUR
TEAM**



Not pictured:

Andrea Kimball, Chief Legal Officer, Matt Hudgins, Director of Technology, and Suzanna Duba, Strategy Analyst

OUR THRIVING RURAL STRATEGY FOCUSES ON:

- 01 HEALTH CARE
- 02 EDUCATION
- 03 ECONOMIC OPPORTUNITY



HEALTH CARE

We work to improve the health and care of rural communities. We believe health and care are two distinct sides of the coin: health connotes healthy lifestyles and preventive wellness, while care describes directed, episodic interventions.

EDUCATION

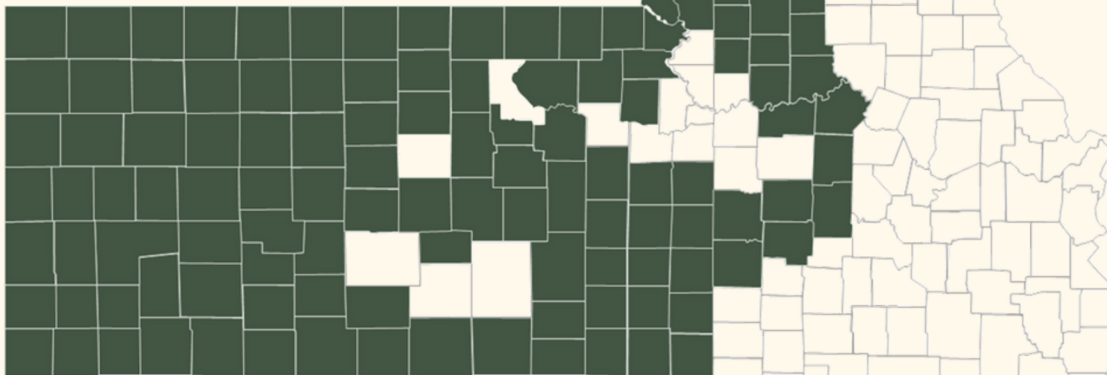
We work to increase the knowledge and skills that support rural thriving. Grants and programs can benefit any part of the educational system, from early childhood to K-12, post-secondary, vocational, leadership, and other skills-based learning.

ECONOMIC OPPORTUNITY

We work to improve the economic position and potential of rural communities. These grants benefit an ecosystem of small businesses, nonprofits, municipal governments, and economic development organizations within a community.



OUR CATCHMENT



We serve counties with 50,000 residents or fewer in Kansas and Western Missouri.

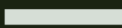


Beyond our specific catchment, we watch for rural-serving organizations or projects that align with our mission.



As a Kansas City-based organization, we support mission-related causes in our own back yards.

2021 Charitable Giving



\$18.3M

THRIVING RURAL

Thriving Rural is our core strategic priority. It includes programs and responsive grants aimed at a broad set of rural needs such as health care, education, and economic opportunity.

\$1.3M

PATTERSON LEGACY

Legacy giving included ongoing support for the Healthy Nevada and Healthe Communities programs, as well as the KU Carol Fabian Professorship, Pembroke Hill School, Little Sisters of the Poor, and The Victory Project.

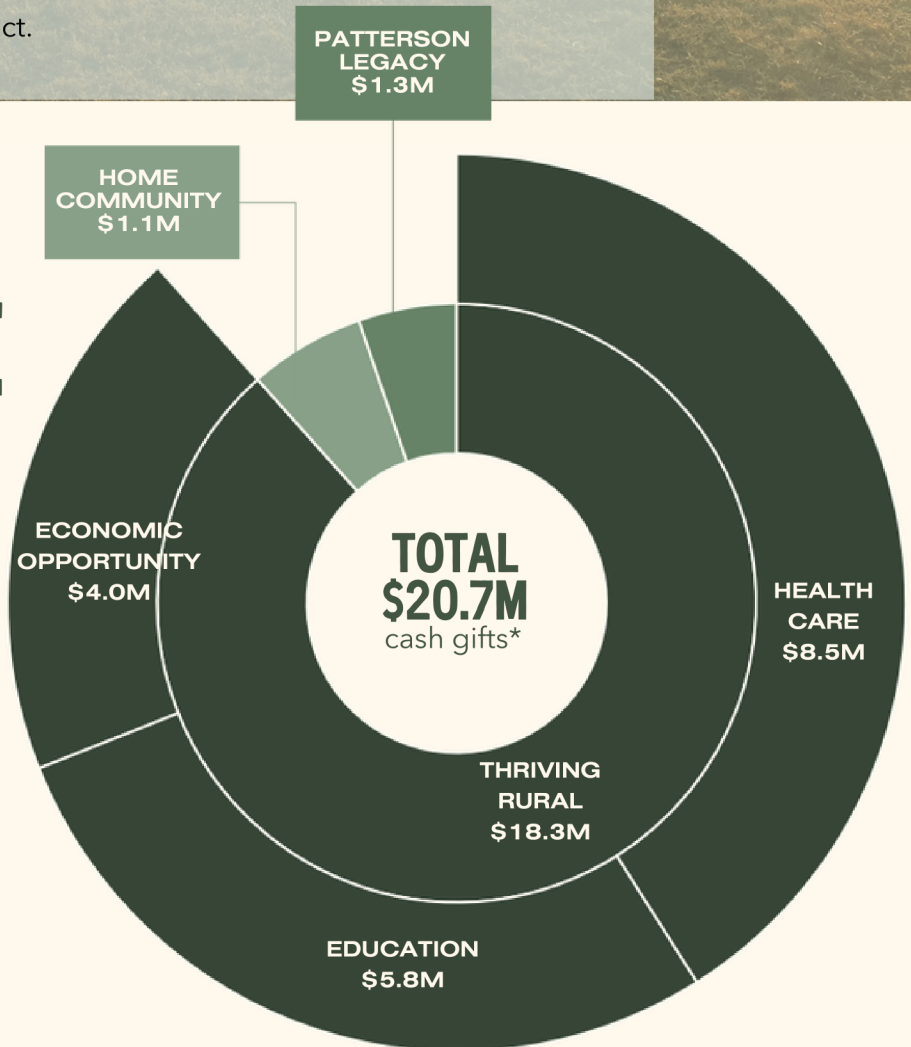
\$1.1M

HOME COMMUNITY

Home Community grants were given to charitable organizations in Kansas City. In 2021, this included pandemic-related support for testing and vaccination.

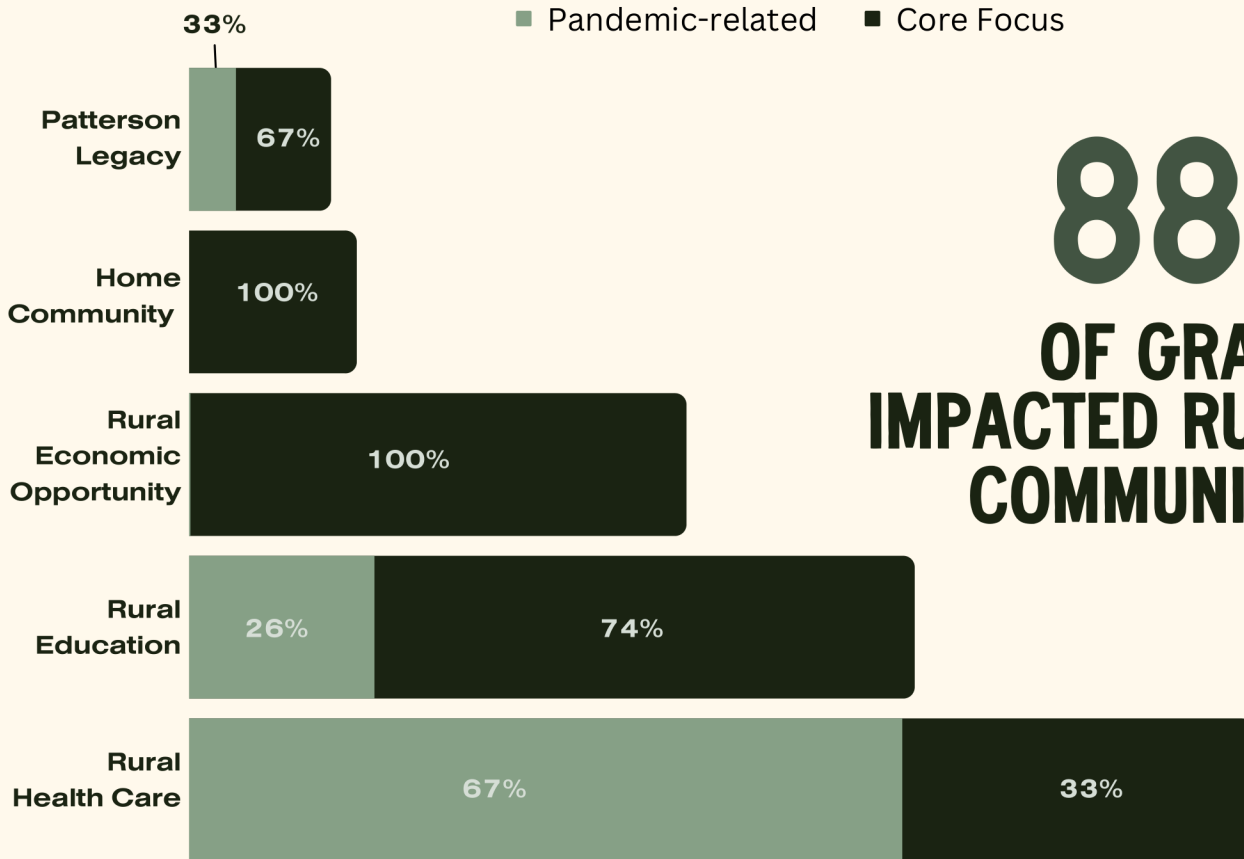


CHARITABLE GIVING



* Patterson Family Foundation's charitable giving in 2021 consisted of \$20.7M in cash gifts along with \$1.6M in pandemic-related PPE, for total charitable gifts valuing \$22.3M.

Ramping Up Rural Impact



88%
OF GRANTS
IMPACTED RURAL
COMMUNITIES

Modes of Engagement

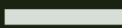


67% PLANNED PROGRAMS
33% RESPONSIVE GRANTMAKING

On an annual basis, we use a mixture of planned and responsive programs and grants to accomplish our work. We start each planning cycle by surveying the landscape and forming relationships and ideas that are activated through planned programs and grantmaking.

In our experience, the people closest to the community have critical insights into local needs and solutions. That is why we also engage in responsive grantmaking in direct response to local requests for assistance.

2021 Foundation Highlights



A Year of Impact and Growth

As Lindsey mentioned in her letter, 2021 was a year of transition. Over the new-year threshold came precautions and challenges borne by the Coronavirus. At the start of the year, pandemic-related deaths were reaching their peak in Kansas and Missouri, and the world was awaiting the rollout of vaccines that would soon follow. There was a period from March to July when case activity was low in our area, and then Delta and Omicron waves rolled through some of our communities later in the year.

Throughout the year, we continued to provide Covid support until gaps were closed. We also took stock of our internal processes and tools and began to optimize them in anticipation of increasing our charitable activity in 2022.

As the world gradually adjusted to new realities, we grew our organization, and we were able to give support to a variety of rural needs. We had a year of learning, building, and giving - some of our favorite things!

In 2021, we connected with most of our constituents and collaborators via teleconference. Whether we met virtually or in person, our team continued cultivating relationships across Kansas and Western Missouri. We made strategic relationships with like-minded organizations in our backyard here in KC, and at the state and national levels.

These engagements helped us corroborate our experience and hypotheses about philanthropy, rural communities, and the areas of overlap and divergence between challenges faced by urban and rural populations.

As a way to facilitate responsive grantmaking, we opened a form on our website encouraging constituents to submit brief Letters of Intent for the projects and opportunities they were addressing. Investigating, engaging, and responding to these requests gave us a sampling of the current landscape in rural Kansas and Western Missouri, which is used in strategic program development.

Our Board met frequently to assess needs, make decisions about grants, and guide the development of our long-term programs and strategies for serving rural communities. Together, we reflected on the impact we want the Foundation to have decades from now, and equally importantly, how to acquire the knowledge, build the measurement tools, and develop the roadmap to get there. We know we are still only beginning to develop an informed opinion of the issues and opportunities facing rural communities, the levers to affect them, and our unique position to use those levers.

WE SUPPORTED MORE THAN
600
ORGANIZATIONS IN 2021



13 30
MAY



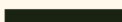
YOUTH LEADERSHIP DEVELOPMENT

Civic leadership is essential to the success of rural places, and the attitudes and skills that create good leaders are fostered early in life. From its roots more than a century ago in promoting agricultural learning, 4-H has grown to become a premier program for developing youth leadership, responsibility, personal growth, and life skills through hands-on learning. In the United States, 4-H programs are administered by the U.S. Department of Agriculture. In support for statewide efforts to grow future leaders, the Patterson Family Foundation was proud to make a first installment on a three-year pledge of more than \$850,000 to support to the Kansas 4-H Foundation. The funds will be used to help fund youth leadership programs, including staffing, curriculum development, and Counselor in Training (CIT) camp scholarships for teens from all 105 Kansas counties.

Improved access to childcare supports multiple goals: early childhood education, families' economic security, and employers' access to a broad pool of applicants. It should be no surprise that rural areas have unique childcare challenges. According to the Center for American Progress (CAP), nearly two-thirds of rural families live in areas where the number of young children outnumbers licensed childcare providers by three to one. In 2021, we were pleased to provide more than \$800,000 in support to rural-serving childcare centers and daycares.



CHILDCARE AND EARLY CHILDHOOD EDUCATION



DOWNTOWN REVITALIZATION IN SMALL TOWNS



Many of the buildings in town squares and downtown areas in communities we serve have been in existence for more than 100 years. These buildings have the rich histories and aesthetic appeal that are so important to their communities' identity, but many have fallen into disuse for want of renovation and modernization. In many cases, the will to renovate is there, along with the plans, but local dollars alone will not go far enough. In 2021, we were proud to join the Kansas Department of Commerce and other partners in offering the Historic Economic Asset Lifeline (HEAL) grant program. HEAL provided enough support to allow 32 commercial buildings in small towns across the state to return to productive use as spaces for business, housing, childcare, the arts, and civic engagement.

One of founder Neal's lifelong passions was support for early-stage entrepreneurship. In 2021, we were honored to partner with NetWork Kansas to expand their Entrepreneurial Community (E-Community) Partnership program. Already in existence as a locally controlled loan fund that assists entrepreneurs with capital and technical assistance, our \$500,000 grant allowed the program to expand to serve additional Kansas communities. In certain circumstances, it permits for a portion of approved loans to be converted to grants so that more earnings can be reinvested in the business. Solving for the needs of rural entrepreneurs is a critical path to having healthy rural communities.

SUPPORT FOR RURAL ENTREPRENEURS



Addressing Ongoing Needs

As the effects of the pandemic persisted into the new year, the Patterson Family Foundation strived to rise to the occasion. While we were learning and planning for the future of our organization, we continued delivering support to schools and hospitals, some of the most vulnerable institutions in rural communities.

PANDEMIC-RELATED HOSPITAL EQUIPMENT GRANTS

The ripple effects of the pandemic added to the burdens of struggling rural hospitals, leaving cash-strapped operating budgets less funding to purchase now-critical equipment and supplies. The Patterson Family Foundation continued a 2020 Pandemic Related funding opportunity to financially assist with medical equipment or supplies aimed at improving the safety, care, or comfort of patients or hospital staff treating patients with COVID-19.

This funding opportunity granted \$4,782,931 across 68 rural-serving hospitals to purchase the equipment and supplies needed for patient care. Awards were available for up to \$100,000 per hospital across our 120-county reach in Kansas and Western Missouri.

**PROVIDERS AND STAFF
OF KEARNY COUNTY
HOSPITAL IN LAKIN,
KANSAS, WITH GRANT-
FUNDED MEDICAL
EQUIPMENT FOR THEIR
CARDIOPULMONARY
DEPARTMENT**



SCHOOL GRANTS

In 2021, schools continued to face significant disruption due to the pandemic. While in-person learning largely resumed in Kansas and Missouri, precautions such as temperature checks, mask requirements, health aides, and other measures added a layer of complexity and expense to already strained systems.

The Patterson Family Foundation invited superintendents of public and private schools across 120 rural and micropolitan counties (95 counties in Kansas and 25 counties in Western Missouri) to apply for funding.

The Foundation awarded \$1.48M in funding to 250 schools for assistance with pandemic-related expenses and needs.



VACCINATION GRANTS

Vaccines against Coronavirus became available in our catchment in March 2021. We knew it was a priority to ensure that organizations offering vaccination events had adequate resources to deliver the vaccine to their communities as quickly and effectively as possible.

The Patterson Family Foundation provided \$746,000 between 58 organizations across our catchment to assist with vaccine deployment.

WASTEWATER COMMUNITY TESTING

In 2021, we were proud to provide continued funding for a novel program that provided wastewater testing for 30 cities in Kansas. We made an initial decision to fund this type of testing after reading about the predictive potential of this method and initiating a conversation with state officials in the Kansas Bureau of Water. PFF funding helped expand a pilot program that otherwise would have been more limited in scope and duration.

When done regularly, wastewater testing reliably predicts surges of Covid-19 nearly a week before it shows up through clinical testing and case surveillance. One wastewater sample provides information equivalent to thousands of individual tests.

Advance notice allows local officials time to prepare for disease outbreak events in a more proactive way. This high-potential method works with rural infrastructure and can be applied to known viruses such as the flu as well as emergent pathogens.



Sharing the Story of Health Care & Community

HARPER COUNTY: HHS PRESENTATION

For years, the rural hospital closure crisis has been putting enormous pressure on communities and policymakers to make difficult choices as they seek a sustainable model of rural health care provision. From 2014 to 2019, Neal and some of our current foundation associates were closely involved in the process of assisting two struggling, neighboring hospitals in Harper County, Kansas, as they evaluated alternatives to a model built for a different era. The delicate and deeply analytical process eventually resulted in a merger between the organizations and the construction of a new, modern, right-sized facility. The \$40M Patterson Health Center project was initiated by Neal and was completed with financial and logistical assistance from the Foundation.

In June 2021, we were invited by former Kansas Governor Jeff Colyer, Chair of the National Advisory Committee on Rural Health and Human Services, to speak to Committee members as they contemplate policies affecting rural communities facing similar choices. In collaboration with Martha Hadsall, a Harper County resident and former PHC Board Chairperson, our Vice President of Programs & Strategy, Jessica Hunt, had the privilege of presenting from her personal experiences assessing community needs, collecting feedback, and working through concerns. We were honored to be asked and pleased that we had an opportunity to emphasize to the Committee the importance of bringing the rural communities along in decisions affecting their future.

**MARTHA
HADSALL**
FORMER CHAIRPERSON,
PATTERSON HEALTH
CENTER BOARD OF
DIRECTORS, JUNE 2019



In Their Words



VIEW ON WEB

While we did not publish press releases of our own in 2021, there were times throughout the year when our grantees were excited enough to spread the word themselves via social media or print. Whenever this has happened, we have been able to catch a glimpse of what philanthropic investment means to them, their constituents, and the local community. Stakeholders work hard to secure funding for a meaningful project, and these stories can help build regional or local awareness of new programs or community assets. We are grateful for the chance to read and share these authentic expressions of the impact of our mission in action.

COFFEYVILLE REGIONAL MEDICAL CENTER

January 2021

The CRMC Foundation was awarded \$100,000 from the Patterson Family Foundation

NEWMAN REGIONAL HEALTH

February 2021

Newman Regional Health Receives \$100,000 Patterson Family Foundation Grant

FOUR STATES HOMEPAGE

February 2021

Grant funds to benefit health initiatives in Nevada

NEVADA DAILY MAIL

February 2021

Health Nevada accepts Patterson Family Foundation three-year grant

NRMC REGIONAL HEALTH

March 2021

NRMC Receives \$100K Gift

NEWMAN REGIONAL HEALTH

March 2021

Thank You Patterson Family Foundation

PEMBROKE HILL BUILDING TOGETHER

April 2021

Building Together Construction Project 60 Percent Complete

KANSAS CITY STAR

May 2021

"Joplin did it." First med school students graduate 10 years after monster tornado

KSN NEWS

May 2021

Marion County Food Bank to get new facility

DENTAL TRIBUNE INTERNATIONAL

May 2021

Kansas City University breaks ground on College of Dental Medicine

SUNFLOWER STATE RADIO

May 2021

Community Memorial Healthcare Receives \$55,000 COVID Grant From Patterson Family Foundation For Fetal Monitoring Systems

KSHB NEWS

May 2021

New "vaccine van" in Kansas City is part of larger shift in mobile health care

GREAT BEND TRIBUNE

September 2021

Pawnee Valley Campus receives ultraviolet room sanitizer thanks to a Patterson Family Foundation grant

REACH OUT AND READ KANSAS CITY

September 2021

WOW!! Last week, our 10th annual fall fundraiser, Books On Tap 2021, was our MOST SUCCESSFUL YET

FORT SCOTT BIZ

September 2021

The Healthy Bourbon County Action Team Awarded \$560,140 Patterson Family Foundation Grant

MIAMI COUNTY CANCER FOUNDATION, INC.

October 2021

Miami County Cancer Foundation was recently the recipient of a \$15,000 charitable gift from the Patterson Family Foundation

FORT SCOTT BIZ

November 2021

Grants available for economic stability and rural food systems

SOUTH BARBER USD 255

November 2021

A big THANK YOU to the Patterson Family Foundation in Kansas City

PRATT COUNTY HEALTH DEPARTMENT

November 2021

Tis' the Season to be Thankful

GREAT BEND TRIBUNE

November 2021

Vision Screeners

CITY OF LINDBORG GOVERNMENT

December 2021

Exciting news for our partners over at Sprout House

TRAVIS LAYER

December 2021

Good evening, I am happy to announce that I received a phone call this afternoon from the Patterson Family Foundation of Kansas City

CHANUTE REGIONAL DEVELOPMENT AUTHORITY

December 2021

Chanute Regional Development Authority receives \$250,000 Patterson Family Foundation Grant

HBCAT NEWS

January 2022

Creative Placemaking Projects Update

NMRM FOUNDATION

January 2022

The generosity of the Patterson Family Foundation is helping improve the health of local residents

WITH GRATITUDE

Thank you for your time and attention in reading this report. Please visit www.pffkc.org to learn more about the Patterson Family Foundation.



PATTERSON
FAMILY FOUNDATION

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