

# Giving Matters

NEWSLETTER FOR THE COMMUNITY FOUNDATION OF GREENVILLE • WINTER 2010

Randy Fisher, Chairman



## CFG Maps Strategy for 2010 – 2015

Over the next five years, the Community Foundation of Greenville will explore some new territory and build on its core strengths, according to a new, five-year strategic plan approved by the Board of Directors in November 2009.

The strategic plan defines three key objectives to guide the Foundation from 2010 to 2015:

- Strengthen the Foundation's leadership and catalyst role in addressing community issues and improving quality of life.
- Increase the Foundation's assets.
- Optimize the Foundation's organizational capacity to achieve its mission.

The Community Foundation embarked on a six-month planning process in June 2009. The planning was facilitated by Eleanor Dunlap, SE Consulting Inc., and Russell Stall, Greenville Forward and guided by Strategic Planning Committee members Jo Hackl, Anna Kate Hipp, Bill Bridges, Doug Brown, Bob Howard, Bob Morris, and Denise Sudderth. The strategic plan was the topic of a Board retreat in September.

The Greenville community provided opinions and guidance through personal interviews with community leaders and an independent focus group of past Board members and volunteers. Research was also conducted of peer community foundations in the southeast for benchmarking and best practices. CFG President Bob Morris said, "We are grateful to all the Board members and community leaders who have guided us in this process and are excited about the focus and future of the Community Foundation."

Over the next five years, the Community Foundation will focus on strategies to meet the objectives of the plan.

*Strengthen the Foundation's leadership and catalyst role in addressing community issues and improving quality of life.*

This will involve renewed efforts to define the community's needs, assets and resources and to focus on specific areas or issues that need attention. We will work to address critical challenges and emerging opportunities through leadership, grants, and partnerships.

*Increase the Foundation's assets.*

The Community Foundation believes that to be a more effective leader it must grow its assets and has set a goal of \$50 million by 2015. The Foundation expects to do this by increasing awareness in the broader community, increasing the number and size of donations, and maintaining effective stewardship of assets.

*Optimize the Foundation's organizational capacity to achieve its mission.*

The Community Foundation will focus on its mission, values, and role in the community. Board leadership, volunteer engagement, adequate staffing and sound management are our focus as the Foundation promotes responsible philanthropy.

During the next five years, we will keep you informed about our progress implementing these strategies. As always, we welcome any comments and suggestions you have to improve our service to Greenville County.

We've been strengthening the network of organizations doing great things for Greenville for over 50 years. Your donation helps us continue our commitment to improve quality of life for everyone. Let's work together.



COMMUNITY FOUNDATION  
• OF GREENVILLE •

# Donations to Annual Campaign Top \$94,000

The 2009 Annual Campaign has raised \$94,293 to support the work of the Community Foundation.

These donations are vital to the operation of the Foundation. "The loyal support of our donors helps us make significant investments in projects that will have a lasting impact on Greenville County," said Bob Morris, President of the Community Foundation. Donations increased 6% over the prior year's campaign and the Community Foundation thanks the following donors for their financial support.

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Buck & Margaret Welling

# Making a Difference

Irvine T. (Buck) Welling Jr. has just entered a new phase in his life as the Chairman Emeritus and Historian of Hollingsworth Funds, Inc., South Carolina's largest charitable foundation. His lifetime of leadership and accomplishment was publicly recognized in 2009 with an honorary Doctor of Humanities degree from Furman University and the Distinguished Citizen Award from the Blue Ridge Council, Boy Scouts of America.

of Greenville. In 1964, he was hired by John D. Hollingsworth. "That changed my world and changed my life," said Buck. He traveled extensively through Europe as he worked for 36 years with Mr. Hollingsworth and also helped him craft his charitable legacy.

During this time, Buck and Margaret were also developing their own charitable plans. As a CPA, Buck understood the advantage of using appreciated stock to support local charities. He said "I like to give stock and it's easier to give that to my Donor-Advised Fund at the Community Foundation and then suggest grantees for that fund." This allows donors like the Wellings to get a deduction for the full value of their stock contributions without paying capital gains tax on the unrealized appreciation. And it leaves more money to give to charities they recommend on a schedule they determine.

Buck's professional advice and personal recommendation were critical in helping Mr. Hollingsworth make one of the largest charitable bequests in the country at his death in 2000. Under provisions of Mr. Hollingsworth's wishes, 45% of the annual income distributions are designated for Furman University; 10% to the Greenville YMCA; and 45% to other 501(c)(3) charities operating within Greenville County. The Community Foundation was added as a designated charity and facilitates the application process for a wide variety of non-profit organizations. Hollingsworth Funds has distributed more than \$21.5 million in financial support during Buck's tenure as Chairman and President.

Buck grew up in Darlington, SC and became an Eagle Scout at age 15. In 1939, he graduated from USC with an accounting degree and was hired by Elliott Davis. Two years later Buck was called to active Naval duty and married his fiancée, Margaret Norwood. During World War II Buck served in Norfolk and the South Pacific. In 1945 Buck and Margaret returned to Greenville and he rejoined the Elliott Davis accounting firm. In 1952 Buck became one of the four owners of the practice which today employees 300 people. More importantly, Buck and Margaret raised three children here and enjoy spending time with their eight grandchildren and four great-granddaughters.

As his professional practice expanded over the years, Buck added one client who had a tremendous impact on his life and the future



## President's Message

Greenville has a well-deserved reputation for its generosity and the Community Foundation benefits from this legacy. Last year we received almost \$5,000,000 in contributions and made grant distributions of close to \$6,000,000. This was good news in the face of what started out as an extremely difficult year. Many local non-profit organizations have told me about the overwhelming need for their services during a period when foundations and individuals are curtailing their financial support.

Another piece of welcome news was that our investment portfolio had a total return of 21.5% for 2009. The Finance and Investment committee continues to identify ways to diversify our portfolio while keeping an eye on the long-term trends that might increase the amount of money that is generated for charitable gifts.

This year our board is implementing a strategic plan that was adopted after a thorough process lead by Jo Hackl, our Vice Chair. A major component of the plan is to identify areas of underserved needs in Greenville County and to invest our volunteer resources and financial capital in an effort to have a significant impact on a particular area of focus.

The Community Foundation is sponsoring a Community Indicators Project with Greenville Forward, Greenville Chamber of Commerce, United Way, Upstate Forever and Alliance of Quality Education. We are working together to analyze data regarding the challenges faced by Greenville County. Greenville Forward will use 2010 US Census information in combination with survey opinions and focus group results to identify priorities for grantmaking by foundations and individual donors. The Community Foundation will use this information to identify grantmaking initiatives. This is the continuation of a long history of leadership by the Community Foundation.

Our hope is that our vision and stewardship will continue to attract additional unrestricted gifts. This will allow us to meet the needs and challenges of building an inclusive and caring hometown. Our goal is to increase our assets to \$50,000,000 over the next five years while maintaining our annual commitments. Your help in this effort is sincerely appreciated.

Best regards,  
**Robert W. Morris, President**

## Four Community Leaders Join Board

The Community Foundation welcomed four new members to its Board in January. The Board has thirty volunteer leaders from Greenville County who are chosen for their commitment to philanthropy and their knowledge of community issues.

- **Roy Abercrombie** is chairman of the Upstate Division of Colliers Keenan and serves on the Clemson University Foundation Board. He worked in banking for 30 years and is past-chair of the Greenville Hospital System Board of Trustees and the Greater Greenville Chamber of Commerce.
- **Sheldon Early** is president of Early Technologies Services, an aviation and business development consulting company.
- **Ralph Sweeney** is the executive director of Pleasant Valley Connection. The Connection provides programs and services for all ages to Greater Pleasant Valley and the Greenville community.
- **Chief Terri Wilfong** was selected as Greenville's police chief in 2007. She has 28 years of service in law enforcement, most recently with Louisville (KY) Metro Police Department.



Ralph Sweeney



Roy Abercrombie



Sheldon Early



Terri Wilfong



# COMMUNITY FOUNDATION

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### Officers

Randy Fisher - <i>Chair</i>	Harriet Goldsmith - <i>Asst. Secretary</i>
Jo Hackl - <i>Vice Chair</i>	Doug Kroske - <i>Treasurer</i>
C. Dan Joyner - <i>Past Chair</i>	Martha Louise Lewis - <i>Asst. Treasurer</i>
Pedrick Lowrey - <i>Secretary</i>	J. Tod Hyché - <i>Legal Counsel</i>

### Directors

Roy Abercrombie	Deborah R. McKetty
Bill Bridges	Glenn Oxner
Doug Brown	Louise Oxner
Mark Clary	Susan C. Priestner
Sheldon Early	Matt Puckett
Perry Gilreath	Emily Sanders
Tracy Hardaway	L. Kent Satterfield
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Anna Kate Hipp	Joe Sullivan
Ken Holcomb	Ralph Sweeney
Robert Howard	Terri Wilfong

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## Community Foundation Announces New Online Grant Process

Non-profit organizations will have an easier time this year when they apply for Community Enrichment Grants from the Community Foundation. An efficient online process has been introduced just in time for the 2010 grant cycle.

Grant coordinator Debbie Cooper said, "Our goal is to help our non-profit organizations by making the grant application process faster and simpler. For the long term, this new online application process will be more efficient and cost effective for both the applicant and the Community Foundation." The new process will not only provide the Foundation with up to

date information, it will also maintain historical records for reference and analysis.

The online application became available January 22 at [www.cfgreenville.org](http://www.cfgreenville.org). An instructional video is also provided on the website. Community Enrichment Grants are due by March 5. Applications for Hollingsworth Funds grants will also be made through this online process.

Initial responses from non-profit organizations using the online application have been very positive. A survey will be conducted at the end of the grant cycle and feedback will be used to make adjustments to the process.

## Grantmaking Deadlines

**Community Enrichment Grants**  
MARCH 5, 2010 AT 4:00 PM

Grants to support community-based projects where a modest grant can make a meaningful and sustained difference in the quality of life of Greenville's citizens. Visit [www.cfgreenville.org](http://www.cfgreenville.org).

**Hollingsworth Funds, Inc.**  
SEPTEMBER 3, 2010 AT 4:00 PM

For the benefit of Furman University, the YMCA of Greenville, and for charitable organizations that operate or conduct affairs for the benefit of charitable uses within Greenville County or for the benefit of residents of Greenville County. Visit [www.cfgreenville.org](http://www.cfgreenville.org).

