

Giving Matters

NEWSLETTER FOR THE COMMUNITY FOUNDATION OF GREENVILLE • WINTER 2019

An Enduring Legacy of Care for Upstate Children and The Greenville Humane Society

Margaret Linder Southern Endowment Fund Reaches \$2 Million Milestone

In March of 2004, Margaret Linder Southern addressed a letter to Bob Morris, president of the Community Foundation of Greenville, requesting that an endowment fund be established in her name at her death. She estimated the value of the proposed bequest to be about \$4 million. Because of her love of animals, she asked that half of the fund's annual distributions benefit the Greenville Humane Society. She asked that the other half be given to support "early childhood education and special education services that primarily benefit children and youth because of my interest in children that I developed as a teacher many years ago."

When Mrs. Southern died in 2012, Morris was surprised to learn that her gift had grown to \$8.4 million—the largest in the Community Foundation's history—significantly increasing its potential to touch the lives of children, animals, and the people who care for them. Following distribution of the 2018 awards, the endowment has disbursed \$2.1 million to 22 organizations, and the Margaret Linder Southern

Endowment Fund (MLSE) continues to shape the charitable landscape in Greenville, now and in the future.

"This is what makes endowments so desirable for nonprofits and rewarding for donors—they make annual grants in perpetuity," Morris said. "We at the Community Foundation are delighted to announce this milestone and reflect on the myriad ways Mrs. Southern's gift has allowed others to continue caring for children and animals as she envisioned. The wide reach of her gift serves as a reminder that forward-thinking citizens from all sectors can make choices that determine the values their community will reflect."

Margaret Linder was born August 8, 1918, in the Sans Souci section of Greenville. She earned an education degree from Greenville Woman's College, and married Charles Southern in 1943. The couple lived for many years in Des Moines, where Mrs. Southern taught students in elementary grades and special needs children. Her husband said she could do whatever she

wanted with her teaching salary, suggesting that she learn about stocks and investing. She did, with promising results.

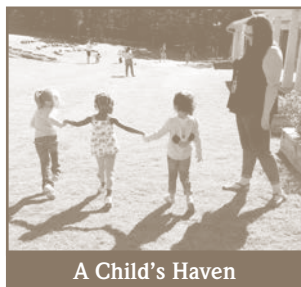
When her husband died in 1983, Mrs. Southern moved back to Greenville and spent a decade caring for her younger brother, Boyce, who had Parkinson's disease. During this time, she got her first dog, a dachshund named Nancy, then another named Molly when Nancy died. These beloved pets inspired her support for animal welfare.

"Her gift was pivotal for the Greenville Humane Society and became the nest egg for a \$3.3 million expansion of our facility," said Kim Pitman, executive director. "This 14,500 square-foot space houses clinics providing low-cost, high-quality spay/neuter and vaccine services to the public; the Healing Place, where animals are treated for serious diseases; and one of the largest no-kill shelters in the Southeast. Without her generous endowment, we couldn't have taken on such an ambitious project."

(continued inside...)



Greenville Humane Society



A Child's Haven



The Children's Museum of the Upstate



Project HOPE Foundation

Bridging Philanthropy & Purpose — We've been strengthening the network of organizations doing great things for Greenville for over 60 years. Your donation helps us continue our commitment to improve quality of life for everyone. Let's work together.



COMMUNITY FOUNDATION
• OF GREENVILLE •

5 Community Leaders Join Board

VAN BROAD



Van Broad earned his degree from College of Charleston in vocal performance. He earned a certificate in economic development from the South Carolina Economic Development School in 2008. Van is the Community Development Director for the City of Mauldin overseeing community events, programming, business recruitment and the Mauldin Cultural Center. He has been involved in the community as Music Director for churches in Charleston, Fountain Inn, and is currently Music Director for Mauldin United Methodist. He is on the advisory board of The Springs in Simpsonville and the Mauldin Cultural Council. He is married to June Conner Broad and they have two children.

BOGUE WALLIN



Bogue Wallin graduated from Colgate University with a degree in History. He is Principal and Owner of Blue Wall Real Estate, a commercial real estate investment and development company. Bogue is also an adjunct member of the faculty at Clemson's Graduate School of Business where he teaches Real Estate Investments. He is the current chair of the Greenville Housing Fund. He has also served on many community nonprofit boards including Dream Big Greenville, Ten at the Top, Furman University Advisory Board, the Greenville Convention and Visitors Bureau, Upstate History Museum, and Carolina Elite Soccer Academy. Bogue is married with three children.

BEN NORWOOD



Ben Norwood earned a Bachelor of Science degree from the University of South Carolina and is a Certified Private Wealth Advisor® (CPWA®) professional. He has been in the financial services industry since 1987 and is a partner at Nachman Norwood & Parrott Wealth Management Consultancy. A Greenville native, Ben serves on many local nonprofit boards including Upstate Senior Living, Inc., Clement's Kindness Fund for the Children, and the Investment Committee for the Montreat Conference Center. He also serves as a member of the Finance and Investment Committee at the Community Foundation of Greenville. Ben and his wife Kathryn have two children.

BEVERLY WARD



Beverly Ward earned her bachelor's degree in Psychology from Cleveland State University and her M.B.A. from the University of St. Thomas in Houston, TX. She is a retiree with over thirty five years of experience in human performance improvement, process reengineering and large-scale program initiatives. Beverly has held senior positions with ExxonMobil, Lehigh University, PricewaterhouseCoopers and IBM. She is very active in the community, serving on a number of boards and currently leads the Grants Review Committee for Greenville Women Giving. Beverly and her husband have resided in Greenville for 16 years and have 2 grown sons.

CAROLINE VAN HOOK, CPA



Caroline Van Hook graduated from Converse College with a degree in Accounting and Finance. She is a Shareholder at Elliott Davis with more than 20 years of public accounting experience. Her primary focus is providing tax planning and compliance services to both the business and the business owner. She is an active board member of the Greenville Local Development Corporation, Greenville Free Medical Clinic, and a member of First Citizens Bank Advisory Board. She is a past board member of United Way of Greenville County Allocations Committee and a graduate of Leadership Greenville Class 35. Caroline and her husband have two children.

*** SPECIAL THANKS ***

We extend a special thanks to our volunteers who completed their service on the Board of Directors in 2018:
Ann Bryan, Mark Crocker, Frances Patterson, Bo Russell, Brenda Thames, and Dick Wilkerson
The Community Foundation of Greenville and the city of Greenville have benefitted from your service! THANK YOU!

Annual Campaign Exceeds \$241,000

We are grateful for the generous donors who contributed to this year's Annual Campaign. These funds are used for operating support to help the Community Foundation of Greenville achieve its mission of enhancing the quality of life in Greenville County by linking philanthropic leadership, charitable resources and civic involvement with needs and opportunities in the community.

"The continued support of our long-time contributors combined with a steady increase of new donors allows the Community Foundation to invest in important projects in Greenville County," says Bob Morris, president of the Community Foundation.

*** WE GRATEFULLY ACKNOWLEDGE THE FOLLOWING DONORS ***

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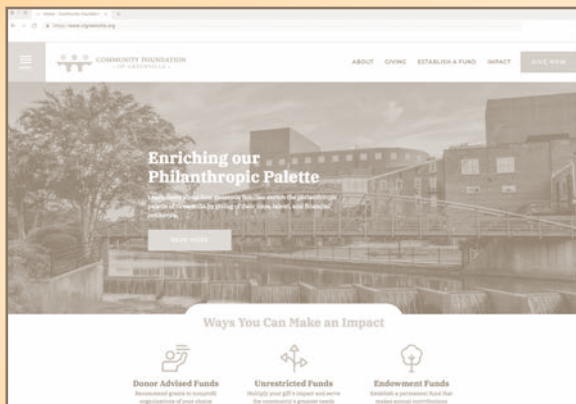
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**COMMUNITY FOUNDATION
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Visit our Website Today!

- Please visit our new microsite called Giving Matters with the Greenville Journal at greenvillejournal.com/giving-matters. This new site is designed to share stories of how philanthropy is impacting our local community.
- We now have online access for fund holders so that they can view their fund information online, make grant recommendations, or check their giving history. Visit our website at cfgreenville.spectrumportal.net/Accounts/LogOn to request online access to your fund today!
- Visit cfgreenville.org/donate today to support our work by contributing to the 2019 Annual Campaign or any other fund held at the Community Foundation.
- You can also visit us on social media! You can find us on [f](https://www.facebook.com/cfgreenville) [i](https://www.instagram.com/cfgreenville) [in](https://www.linkedin.com/company/cfgreenville).

Check out our new website at www.cfgreenville.org

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Margaret Linder Southern

Lesa Kastler, chair of the Margaret Linder Southern Endowment Committee and the Community Foundation board, commended grant makers and those requesting grants alike for always keeping Mrs. Southern's wishes at the forefront of the allocation process.

"Margaret Linder Southern's guiding directive for grantmaking was both specific and broad. As such, grants since 2013 have resulted in phenomenal impact for Greenville County," Kastler said. "To illustrate, funding has supported operations, strategic planning, growth initiatives including scholarships, therapies, curriculum, specialized equipment, and advanced technology for classrooms."

For a glance at the full list of MLS Endowment grants, visit our website at cfgreenville.org.

As published in the March 1, 2019 Greenville Journal

By Rebecca Howerton, contributor

2018 Capacity Building Grants

The Community Foundation allocates funds for Capacity Building Grants based on income generated by the Foundation's unrestricted endowment and donor contributions. We believe that when capacity building is successful, it strengthens and improves a nonprofit's ability to achieve its mission, sustain itself over time, and have a quantifiable impact on the community it serves.

We are proud to provide Capacity Building Grants to the following organizations:

Center for Developmental Services – \$17,000

Funds will be used for a technology update which includes replacement and upgrades to current computers that support critical services provided to partner agencies and families.

Centre Stage South Carolina – \$9,000

Funds will be used for technology upgrade and equipment that supports their mission to produce diverse theatre, support local artists, and provide outreach opportunities.

Clarity – \$9,000

Funds will be used for the development of a new strategic plan incorporating results from the Core Capacity Assessment Tool (CCAT).

CommunityWorks – \$4,500

Funds will be used to complete an online survey-based assessment tool in preparation for the creation of a new strategic plan.

Greenville

Symphony Association – \$10,000

Funds will be used to purchase new advanced technology including new computers and projector to improve efficiency of staff and reduce the risk of lost information.

Greer Relief & Resources Agency – \$5,000

Funds will be used for technology upgrades including purchase of new computers and laptops to assist with meeting the needs of staff and clients.

Loaves & Fishes – \$12,000

Funds will be used for technology upgrades including training on new equipment, data conversion for an online donor management system, and to upgrade their web-based reporting system.

Meyer Center for Special Children – \$6,000

Funds will be used for the creation of a new marketing video that will include their updated logo, renovated facility, and current student population.

Servants for Sight – \$16,000

Funds will be used to underwrite licensing and implementation of a web-based case management software system. The system will help with follow-up care so that more clients can be served.

Triune Mercy Center – \$9,000

Funds will go towards technology and security upgrades to equip staff with updated computers and ensure extra safety measures for staff and clients.

YouthBase – \$2,500

Funds will be used to upgrade technology including computers and printers and subscribe to online educational resources to help them fulfill their mission.

President's Message

In this edition of Giving Matters we are celebrating the milestone reached by the Margaret Linder Southern Endowment Fund. To date, it has made grants to twenty-two local organizations and surpassed \$2 million in distributions. Mrs. Southern put a plan in place with us, her investment advisor, and attorney in 2004 to articulate her charitable intentions. Her bequest in 2012 created a generous endowment fund to make annual gifts to the Greenville Humane Society and charities that support early childhood education and programs for special needs children and youth. Mrs. Southern is impacting the lives of thousands of families with her gift.

Earlier this year our Board awarded \$100,000 in Capacity Building Grants to eleven local nonprofit organizations. Income from our operating endowment and annual campaign gifts are used to fund these grants to improve the effectiveness of local agencies. Each year we provide funding for strategic planning, technology upgrades and marketing initiatives that are beyond the scope of an agency's current operating budget.

Please visit our new microsite, Giving Matters, at greenvillejournal.com/giving-matters. The stories highlight the impact of philanthropy and remind readers how the Community Foundation is linking philanthropic leadership, charitable resources, and civic involvement with needs and opportunities in the community.

Thank you for your continued interest and investment in our work.

Warmest regards,
Robert W. Morris, President

If you have made a planned gift for the Community Foundation, please contact Bob Morris at 864-233-5925.



COMMUNITY FOUNDATION OF GREENVILLE

Bridging Philanthropy & Purpose

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Making a Difference

Margaret Linder Southern Endowment Fund

The Margaret Linder Southern Endowment Fund was established in 2013 with an \$8.4 million bequest from Margaret Southern. This fund makes perpetual annual distributions to benefit early childhood education, special education for children and youth, and the Greenville Humane Society. This year's distributions will benefit our community through the following organizations:

Greenville County Care Coordination Collaborative – \$34,323
Greenville County Care Coordination Collaborative links families to existing, community-based resources and services for children at-risk for developmental, behavioral, or learning problems. These funds will help launch an exciting new place-based project tackling child homelessness in Greenville.

The Chandler School – \$16,010
The Chandler School was established to empower talented and bright students with dyslexia or other related language-based learning differences to become better learners. Funding will provide a new K-5 math curriculum and teacher training to implement problem-based learning with resources for fluency.

St. Anthony of Padua Catholic School – \$30,667
St. Anthony of Padua Catholic School educates and inspires students to be life-long learners and prepares them for lives of leadership and service. Funds will create a cohesive learning environment that blends advanced technology and teaching to meet the individualized capacities of children in early primary classrooms.

Institute for Child Success – \$40,000
The Institute for Child Success (ICS) is an independent, nonpartisan, nonprofit research and policy organization. This request is to support the feasibility of a potential new project to identify opportunities, challenges, and a path forward to launching a continuum of evidence-based services to local families with young children.

Greenville Humane Society – \$150,000
Greenville Humane Society is one of the largest no-kill facilities in the Southeast that works in partnership with the community to create an environment where all animals are treated with compassion and respect. Funds will go towards helping them fulfill this mission.

Quest Leadership Academy – \$29,000
Quest Leadership Academy Public Charter School is established to provide a solid, core-based educational program and develop exceptional learners and leadership scholars who achieve their highest potential. Funding will help provide advanced technology, leadership club activities, and parent outreach.

Scholarship Information

Please visit our website at cfgreenville.org/scholarship-funds.php to find a list of available scholarships. Information includes a description, criteria to apply, and application deadlines of all scholarship funds administered by the Community Foundation.



Legacy Society

Our Legacy Society members are creating their own lasting charitable legacy with a planned gift to the Community Foundation or any fund at the Foundation. Planned gifts can be made by will or revocable trust, beneficiary designations of IRA and retirement plan assets, gifts of life insurance, charitable lead trusts, and charitable remainder trusts.

For more information about becoming a Legacy Society member, please call Bob Morris or Gina Blohm at 864-233-5925.