



2016 ANNUAL REPORT



COMMUNITY
FOUNDATION
OF THE LOWCOUNTRY

LOOK CLOSELY AT A TINY PIECE OF GLASS.

Though a spark may dance if it catches the light just right, by itself, its beauty is limited. But connect it with many other tiny pieces of glass and an elaborate pattern emerges...a picture...a whole.

A community is like that. Each person, neighborhood and institution has a vital function that carries its own importance. But connect them – find synergies, address challenges, discover common goals – and what can be accomplished multiplies.

We like to think Community Foundation of the Lowcountry serves as a connector, identifying individual pieces of glass and joining them together. Whether it's connecting donors and volunteers to nonprofits, nonprofits to grants, students to the arts or low-income households to public sewer, our understanding of local issues and our own connections within the region give us the ability – and the duty – to put the pieces together.

This year's annual report shares some of the ways Community Foundation of the Lowcountry connects the tiny pieces of glass in our community and how we contribute to the creation of a beautiful community mosaic.

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CONNECTING PEOPLE, RESOURCES AND NEEDS

As one of almost 750 community foundations across the country, Community Foundation of the Lowcountry is a tax exempt public charity focusing on local needs. Our mission is to build and strengthen our community and we accomplish this in a number of ways.

WE OFFER A VARIETY OF GIVING VEHICLES that are easy to set up and that provide tax benefits. We invest and administer these charitable funds, alleviating paperwork for those who establish funds and making it practically effortless to engage in meaningful philanthropy.

WE NURTURE THE NONPROFIT SECTOR. We provide training to strengthen nonprofit boards and improve operations. We develop comprehensive initiatives that give nonprofits helpful tools to more effectively reach donors and volunteers. We fund grants that help local nonprofits launch or expand programs, build capacity and successfully fulfill their missions.

WE SUPPORT HIGHER EDUCATION and manage scholarship funds that benefit local students.

WE IDENTIFY EMERGING ISSUES and convene community leaders to address them.

We know our communities, share your interests and care about the future.



OUR MISSION, VISION AND VALUES

MISSION STATEMENT

Strengthening community by connecting people, resources and needs.

VISION STATEMENT

Community Foundation of the Lowcountry is the most respected and able provider of philanthropic direction, management, education and support to the people in the communities we serve.

CORE VALUES

We are dedicated to the following core values: integrity, honesty, respect, fairness, caring, stewardship and responsiveness.

GUIDING PRINCIPLES

Community Foundation of the Lowcountry is committed to:

- building a caring regional community.
- advocating private giving for the public good.
- providing philanthropic services to donors of all means.
- convening and connecting community resources.
- being a source of knowledge regarding issues affecting the community.
- taking the initiative to improve the community through philanthropy.
- being held to the highest ethical standards through fairness in policies and procedures, full and objective review of funding requests, and the avoidance of conflict of interest.
- measuring outcomes and demonstrating results in all its philanthropic activities.
- being an integral part of the national community foundation field and philanthropy as a whole.

These guiding principles reflect our commitment to provide the most effective stewardship of the charitable resources with which we have been entrusted.

Community Foundation of the Lowcountry is confirmed in compliance with National Standards.



Betty Days says life is more comfortable now that her home is connected to the public sewer. Photo credit: Sue Carlson

HELPING NEIGHBORS CONNECT FOR GOOD

BETTY DAYS SITS ON HER FRONT PORCH AND REMEMBERS WHEN HER SEPTIC SYSTEM USED TO SIGNAL IT WAS TIME FOR ONE OF ITS FREQUENT PUMP OUTS.

“Our toilets would back up into the house. We’d have to slow down our water usage. We couldn’t do wash. We’d have to call and get it pumped out,” she says. “It was a constant cycle.” And it was expensive.

Days is one of many Native Islanders who has watched Hilton Head Island develop into a world-class resort, all the while fighting for some of the basic services most of us take for granted. “It was particularly stressful when my children were small. It just wasn’t healthy.”

Days and her neighbors are now connected to the public sewer system, thanks to grants from the Community Foundation’s Project SAFE Fund. When she heard about the grants several years ago, she went door-to-door in her neighborhood to explain the application process. She says all her neighbors are now connected to public sewer and they no longer have to deal with the problems associated with septic systems.

Those problems don’t affect only those with septic systems. According to Dr. Stephen Borgianini, associate professor of ecology and evolutionary biology at University of South Carolina Beaufort, we all feel the impact of faulty septic systems. “If a system fails on one property, it migrates and impacts adjacent homeowners. Through various routes it finds its way to the very environmentally-sensitive surface water and contaminates it,” he says. “Once contaminants reach the waterway, there’s no limit to where they can travel.” He says this spread of contaminants exposes individuals to pathogens and degrades the environment. “So the collective population and the environment are impacted.”

Hilton Head Mayor David Bennett feels we have a moral obligation to solve the problem. “If we’re going to claim a legacy of environmental stewardship, it’s inconceivable to me that we can let this problem persist,” he says. Public sewer

access claimed a top spot in Bennett’s mayoral campaign platform. “It was a sign of marginalization of some of our longest-standing citizens and I wasn’t willing to accept that.”

The issue of public sewer access isn’t a new one. Community Foundation of the Lowcountry established the Project SAFE (Sewer Access for Everyone) fund back in 2000. Hilton Head Public Service District (PSD) recognized the need to help residents connect to public sewer and established a round-up program in 2006, with money raised going into the Project SAFE Fund.

Pete Nardi, general manager for Hilton Head PSD, agrees that the effects of this project are of critical importance. “About \$800,000 has been donated to Project SAFE since 2001, which has helped more than 400 families connect to sewer. We’re proud that over \$238,000 was raised by the PSD’s round-up program, showing that our customers also understand the need and support this project.”

But now, through the Community Foundation’s efforts, Hilton Head Island Town Council voted to allocate \$5.8 million for sewer line installation and PSD has earmarked \$3.5 million for pump stations and project management costs. The only thing missing is money to fund grants for low-income households to connect their homes to the main lines. Those connections can run as high \$13,000 each.

That’s what the Community Foundation is addressing. “The Community Foundation and PSD have been working together to connect qualified homeowners to public sewer since 2006,” Jim Allhusen, Community Foundation board member and chair

of the Project SAFE Committee says. “But we still have hundreds of homes to connect. Our goal is to get all qualified homeowners connected by 2020. That’s why we’ve launched a capital campaign – the first in our history – called Connect for Good. Working together with the Town of Hilton Head Island and PSD, we can do it. But only if the community supports our efforts.”

Connect for Good aims to raise \$3 million over the next several years. The Community Foundation has taken the first step in reaching this goal. In March, the Community Foundation board of directors voted to grant \$500,000 toward the effort.

“We believe in putting our money where our mouth is,” Allhusen says. “Project SAFE is one of the most important initiatives Hilton Head Island has seen and it’s one of the most important initiatives the Community Foundation has undertaken. We are committed to supporting it, not only by acting as fiscal agent for grants, screening applicants for eligibility and raising \$3 million, but by contributing to the \$3 million fundraising goal. We hope the community will get behind this effort, because it affects us all.”

Betty Days says having access to public sewer is a blessing. “We’re so grateful there are people concerned about those of us affected by this. They’re helping us to live a more comfortable life.”



IF YOU’D LIKE MORE INFORMATION ABOUT PROJECT SAFE OR WOULD LIKE TO MAKE A DONATION, PLEASE CALL US AT 843.681.9100 OR GO TO OUR WEBSITE AT WWW.CF-LOWCOUNTRY.ORG AND CLICK ON THE PROJECT SAFE BANNER.



PROFILES IN CONNECTION

IT'S BEEN SAID A PERSON'S FAVORITE TOPIC OF CONVERSATION IS HIMSELF.

It's no different for nonprofit organizations. When they work hard to tackle a problem, they want people to know about it.

Community Foundation of the Lowcountry wants the community to know about these achievements as well, so we found a way to help connect our community to our hard-working nonprofits. Working with Guidestar, we created The Giving Marketplace, a free online tool that offers nonprofits a forum to share information about themselves.

“It's a great place to blow our horn, highlight the things we do best, talk

about our new programs and show the community how we're fulfilling our mission,” says Pam Wall, executive director of The Literacy Center. “It's like the Good Housekeeping Seal® of approval.”

Launched in July 2015, more than 130 local nonprofits have logged in to create or begin creating their individual profiles. Log in, select a profile and you'll find comprehensive information about the nonprofit's mission, programs, governance, outcomes and financials. The Giving Marketplace is a great tool for anyone who's connected to nonprofits – donors, funders, media, volunteers, potential board members, job hunters – just about all of us, really.

Carole Galli, chair of the 2017 All Saints Garden Tour, says they recently started using The Giving Marketplace in their grantmaking process

Carole and her committee “strongly encourage” grant applicants to create a profile on The Giving Marketplace. “The Giving Marketplace has allowed us to make our grantmaking process easier. It saves paper and time for both the committee and the applicants.”

Instead of requiring grant applicants to supply copies of their tax forms and audits, descriptions of their programs, a list of board members,

and all the other paperwork nonprofits must complete for a grant, the committee has instead decided to access The Giving Marketplace for this information. “We'll review their Giving Marketplace profiles during the decision process,” Carole says. “All the information is right there. I'd like to go out to every grantor and funder and say, ‘Do yourself a favor and do this!’”

The Giving Marketplace is also a terrific tool for donors, providing insight into organizations that share their philanthropic values and helping them determine the impact of their donation.



TAKE A LOOK. LOG IN AT

WWW.CF-LOWCOUNTRY.ORG/WORKINGWITHUS/THEGIVINGMARKETPLACE



FINDING THE PERFECT MATCH

VOLUNTEERING OFFERS IMMEASURABLE BENEFITS TO NONPROFIT ORGANIZATIONS AND TO THOSE WHO SHARE THEIR TIME.

To help facilitate connecting volunteers and nonprofits, Community Foundation of the Lowcountry hosts Lowcountry Volunteer Connections, an online tool in which nonprofits list their volunteer opportunities and volunteers find their perfect match.

Several years ago NAMI (National Alliance on Mental Illness) Lowcountry was in search of volunteers and Laurie Shay, of Bluffton, discovered a life-changing opportunity.

We sat down with Sarah Eliasoph, executive director of NAMI Lowcountry, and Laurie Shay, a volunteer at NAMI, to talk about their experience.

Q: LAURIE, HOW DID YOU CONNECT WITH NAMI?

LAURIE: Someone told me to go to the Community Foundation site. I found the link to Lowcountry Volunteer Connections and searched the list. When I saw the NAMI listing, I said, “Oh, look! That would work for me. I can do that!”

Q: WAS THIS YOUR FIRST VOLUNTEER EXPERIENCE?

LAURIE: I volunteered for several local organizations, but I got kind of burned out. I gave myself some time to regroup and then I called NAMI. Because I have a mental illness, I knew it was an opportunity for me to reach out to the community.

SARAH: Laurie came in and I thought, “Not only someone who will talk about it (mental illness), but wants to help and is an organized business person.” I think she just flew in on wings.

LAURIE: I trained for our “In Our Own Voice” presentation. That’s where two people with mental illness tell their story (to others with mental illness). Then I trained to be a facilitator for our Connections meetings – a support group. That program has grown from one meeting to multiple meetings throughout the area.

SARAH: The growth of the program speaks to the power of volunteering. The meetings used to have about four or five people attend. Now there are 12 to 15 people. All our programs are peer-led. That’s why it’s so unusual to get such a fabulous volunteer to find us!

Q: LAURIE, WHAT ARE SOME OF YOUR OTHER VOLUNTEER “JOBS”?

LAURIE: I’m also trained as a mentor – a teacher of our peer-to-peer program. I serve on the NAMI board of directors and I’m the interim chair for our consumer council.

Q: YOU OBVIOUSLY GIVE A LOT OF YOUR TIME, YOUR ENERGY, YOUR TALENTS. WHAT DO YOU GET IN RETURN?

LAURIE: Volunteering has given me an opportunity to give back to my community, which offers me a sense of purpose and hope because I get to work with people like me, so I’m not alone. On a more practical note, it’s important for me in managing my illness to have avenues for challenging myself intellectually. Volunteering at NAMI offers me an avenue for structuring my life.

SARAH: Without trained volunteers for our programs, along with office volunteers and fundraising volunteers, NAMI wouldn’t be alive – we’d be dead in the water. We can’t live without volunteers.



Sarah Eliasoph (left) and Laurie Shay (right) say Lowcountry Volunteer Connections was instrumental in facilitating the perfect volunteer match.



TO FIND YOUR PERFECT VOLUNTEER MATCH, VISIT [LOWCOUNTRY VOLUNTEER CONNECTIONS AT CF-LOWCOUNTRY.ORG/WORKINGWITHUS](https://www.cf-lowcountry.org/workingwithus) AND CLICK ON “FOR VOLUNTEERS.”



KEEPING THE LOWCOUNTRY STRONG

JUST AS THE LOWCOUNTRY EMERGED FROM AN UNCOMFORTABLE SUMMER OF RECORD-BREAKING HEAT AND HUMIDITY, MOTHER NATURE OFFERED US A NEW CHALLENGE.

Hurricane Matthew seemed to target us, slowly and angrily meandering up the coast. Most of us evacuated, praying the meteorologists were wrong, that Matthew would take a sudden turn west, that our homes and livelihoods would be spared.

Some of us were lucky. Some of us, not so much.

Each June 1st we're reminded that hurricanes are, once again, a possibility. But we write them off,

reciting long-ago dates of "the last time we were hit," blissfully convincing ourselves we're somehow exempt and rationalizing that the balmy weather and beautiful landscapes make the gamble worth it.

But natural disasters are an ever-present possibility – a part of the local landscape. With that realization, Community Foundation of the Lowcountry established the Disaster Recovery and Rebuilding Fund in 2004. The purpose of the fund is to provide local nonprofits with dollars to help our community in meeting the immediate needs of the individuals and families they serve, and in the long-term rebuilding process.

One day after the storm hit the Lowcountry, Community Foundation's board of directors voted to add an additional \$100,000 to the fund. Within days, grants were awarded to American Red Cross, Bluffton Self Help and Deep Well Project – nonprofit organizations providing direct service to those most in need. As time passes, the focus of the grants will change from recovery to rebuilding.

The outpouring of assistance and good deeds has been overwhelming. We've all heard stories of neighbor helping neighbor or, even more impressive, neighbor helping stranger, in the immediate aftermath of the storm. Those stories help us move past the devastation and forget the beating we took.

Hurricane Matthew isn't over. There will be ongoing needs in our community. We're thankful the Disaster

Recovery and Rebuilding Fund will be a resource for restoring our way of life. But the fund relies on the generosity of our donors and community to continue the rebuilding process.

Most of us still believe the gamble of living here is worth it – that the beauty we're so privileged to experience every day makes the odds acceptable. It's nice to know that when we face another disaster, Community Foundation of the Lowcountry will be here to provide support to get back on our feet, helping us stay Lowcountry Strong.



PLEASE CONSIDER A DONATION TO OUR DISASTER RECOVERY AND REBUILDING FUND. YOU CAN DO IT ONLINE (CF-LOWCOUNTRY.ORG) OR BY CHECK, USING THE ENCLOSED ENVELOPE.

BRINGING ART LOVERS TOGETHER



JR and Leslie Richardson pose with their favorite piece, “Charles E. Fraser.” “Charles Fraser was my mentor and the father of modern day development,” JR says. “When I pass by Compass Rose Park and look at Charles Fraser’s likeness, I feel the energy and strength of our community.” The Richardsons, instrumental in launching the Public Art Fund, also sponsored the Purchase Prize Award for the 2015 Public Art Exhibition on Hilton Head Island. The purchased piece, “Setting Sun,” will be placed in the new Coligny Park once construction is completed. Photo credit: Sue Carlson

TWELVE YEARS AGO, BOB ONORATO, A COMMUNITY FOUNDATION OF THE LOWCOUNTRY BOARD MEMBER, HAD THE IDEA TO ESTABLISH A PUBLIC ART FUND.

Working with the Town of Hilton Head Island, an agreement was struck that the fund would raise money to purchase large-scale sculptures that would be donated to the town to build a permanent art collection.

Later, when Hilton Head developer JR Richardson sat on the Community Foundation’s board of directors, his passion for the arts and for beautifying Hilton Head Island brought to fruition the fund’s first public art installation. Under JR’s leadership, a committee raised over \$126,000 to commission “Charles E. Fraser,” which was permanently installed at Compass Rose Park in 2010.

Since that time, eight other pieces have been added to the collection, most secured via the Public Art Exhibition on Hilton Head Island, a biennial event sponsored by the Public Art Fund and held at Coastal Discovery Museum. Through it all, the sentiment that launched the Public Art Fund in 2004 has remained constant. “Public art sets the tone for a community,” Richardson says. “Each piece has its own personality and creates interest and intrigue for our island.”

David Bennett, mayor of Hilton Head Island agrees. “Art speaks to people. It allows people to come together and have discussions,” he says. “My desire is to see all citizens touched by art, nature and our culture. Our public art program allows everyone – those with means and those without – to enjoy the beauty of art.”

Providing everyone a chance to enjoy public art led to an additional partnership with Island School Council for the Arts (ISCA), which makes arrangements for school-aged children to get involved in the exhibition. During the 2015 exhibition, local high school students helped build “THEB: Tally,” a metal piece that has been permanently installed on Highway 278 on the north end of the island; elementary school students enjoyed field trips to the exhibition; and two participating artists visited schools to conduct hands-on presentations.

“There’s really no accessible art on that scale in the area,” Patti Maurer, executive director of ISCA says. “That’s why it’s so exciting to see artists of that caliber bringing these pieces and for our kids to have access to them. And having the artists come into the schools made a big impact on the students that were involved.”

We think everyone benefits from public art. Perhaps Richardson sums it up best, “I believe public art can click something inside of you that rewires you and makes you think differently. Public art is for everyone and we have such a generous community that reaches deep to ensure everyone has the chance to enjoy it.”



IF YOU’D LIKE MORE INFORMATION ABOUT THE PUBLIC ART FUND, PLEASE CONTACT THE COMMUNITY FOUNDATION AT 843.681.9100 OR VISIT THE WEBSITE AT HHIPUBLICART.ORG

OUR GRANTMAKING

Community Foundation of the Lowcountry awards a variety of grants to qualified nonprofit organizations, some through a competitive grants application process, some through funds designated for specific purposes and others that originate from a donor's request.

In fiscal year 2016, we awarded \$709,738 through our competitive and foundation-directed grants.

COMPETITIVE GRANTS

Competitive grants awarded through an application process include organizational development grants, community impact grants and community investment grants.

ORGANIZATIONAL DEVELOPMENT GRANTS

Awarded to existing nonprofits to retain a consultant to help build capacity or achieve sustainability, these grants do not exceed \$5,000. The following nonprofits received organizational development grants totaling \$25,000 in fiscal year 2016:

- ▶ Beaufort County Disabilities Coalition
- ▶ Lowcountry Coalition Against Human Trafficking
- ▶ Born to Read, Inc.
- ▶ Extra Mile Club
- ▶ ACCESS Network

COMMUNITY IMPACT GRANTS AND COMMUNITY INVESTMENT GRANTS

These grants provide larger dollar amounts to local nonprofits. The comprehensive application process includes on-site interviews and a final report. A grants advisory committee reviews applications, meets with applicants and recommends awards. Last year \$660,703 was awarded to the following nonprofits:

COMMUNITY IMPACT GRANTS

- ▶ Bluffton Self Help: \$40,000 to fund a development and marketing position
- ▶ Programs for Exceptional People (PEP): \$19,500 to fund a community liaison coordinator
- ▶ American Red Cross: \$20,950 for the Prepare SC: Ready 365 program
- ▶ Coastal Discovery Museum: \$45,000 for the Transforming the Coastal Discovery Museum project
- ▶ Hope Haven of the Lowcountry: \$66,835 for a clinical services director
- ▶ The Literacy Center: \$36,813 to fund Family Literacy 360: Phase II – Bluffton
- ▶ SC Governor's School for Science and Mathematics: \$10,000 to fund iTEAMS Xtreme: Next Generation & CREATEng

COMMUNITY INVESTMENT GRANTS

- ▶ Boys & Girls Club of Hilton Head Island: \$40,000 for their Discovery Playground
- ▶ Hilton Head Island Deep Well Project: \$55,000 to renovate their livable housing and furniture warehouse
- ▶ Hospice Care of the Lowcountry: \$60,000 to fund electronic medical records
- ▶ Volunteers in Medicine: \$60,000 to expand technology and communications infrastructure
- ▶ Antioch Educational Center: \$75,000 to help purchase a building for their medical training programs
- ▶ Lowcountry Amateur Radio Repeater Association, Inc.: \$10,800 to help fund their Emergency Digital Repeater Network
- ▶ Santa Elena Project Foundation: \$30,000 to support their opening exhibit
- ▶ Friends of the Savannah Coastal Wildlife Refuges, Inc.: \$37,000 to increase visitor accessibility at Pinckney Island National Wildlife Refuge
- ▶ Heritage Library Foundation: \$15,595 to fund research on the Reconstruction Era on Hilton Head Island
- ▶ Waddell Mariculture Fund of the Community Foundation: \$17,710 to purchase a new seawater filter

FOUNDATION-DIRECTED GRANTS

These grants fund small projects. In fiscal year 2016, we awarded \$24,035 to these 10 organizations:

- ▶ Meals on Wheels
- ▶ Santa Elena Project Foundation
- ▶ First Books of Beaufort
- ▶ Love for Therapeutic Riding
- ▶ Boys & Girls Club of Hilton Head Island
- ▶ Helping Hand Center
- ▶ Spartanburg Community Foundation
- ▶ Beaufort County School District
- ▶ South Carolina Association of Non-Profit Organizations
- ▶ Beaufort Housing Authority

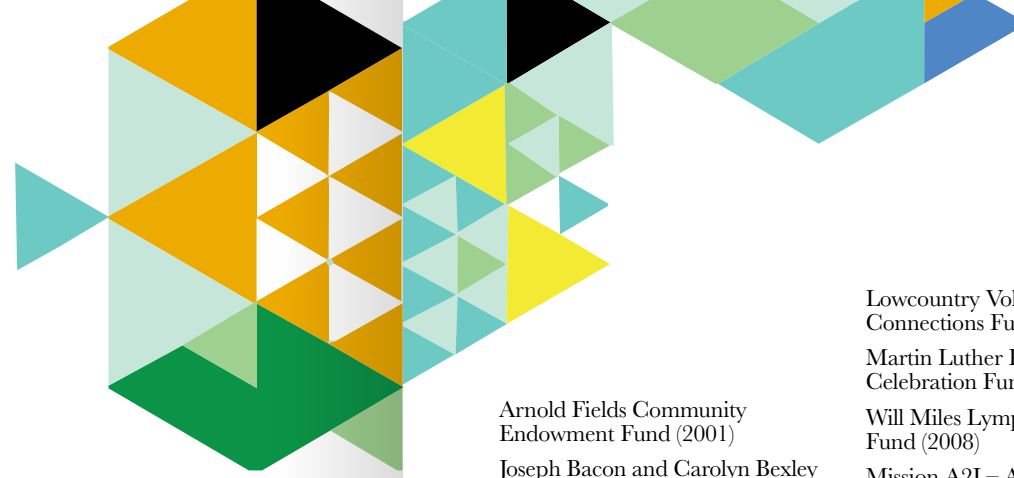
FIELD-OF-INTEREST FUND GRANTS

These funds – Women in Philanthropy, PEARLS of Hampton County and Jasper Community Fund – have a request for proposal process. These groups provided \$91,000 in funding to local nonprofits for mission-driven programs.

CONNECTING DONORS TO PERSONALIZED PHILANTHROPY

Finding the perfect connection between a donor's interests and the appropriate giving vehicle is something we do every day. Our individualized approach, research and analysis, and online options help donors find the best fund to practice personalized and passionate philanthropy. Working with the Community Foundation means funds are invested and professionally managed, that donors achieve maximum tax advantages and have the flexibility to advise us when and where to recommend grants.

Here is a list of our funds. (Scholarship funds can be found on page 21.)



▶ UNRESTRICTED FUNDS

Unrestricted funds can be established in your name or in the name of a loved one. Because these funds offer considerable flexibility, Community Foundation of the Lowcountry can use unrestricted funds to make grants in areas that have the most impact in our community.

- Sally Ahrendt Endowment Fund (2016)*
- Shirley E. Caputo Memorial Fund (2007)
- Community Foundation of the Lowcountry Administrative Endowment Fund (2000)
- Community Foundation Memorials and Special Occasions Fund (2011)
- Community Foundation of the Lowcountry Operating Fund (1996)
- Marion M. Dutcher Memorial Fund (2011)
- John Seely Memorial Fund (2003)
- Lowell H. and Betty J. Van Epp Memorial Fund (2010)
- Virginia and Bernard von Hoffmann Memorial Fund (2011)

▶ SUPPORTING ORGANIZATIONS

Supporting organizations are charities that support other exempt organizations and, in specific circumstances, can be formed in connection with Community Foundation of the Lowcountry. Check with your professional advisor for additional information.

- The Jim and Margaret Krum Foundation (2012)

▶ FIELD-OF-INTEREST FUNDS

Field-of-interest funds allow you to support a specifically-defined charitable interest or geographic area. You develop the grant-making process. Your involvement in the grantmaking process is up to you: You can be intimately involved, help appoint an advisory committee or leave the work to us.

- Beaufort County Animal Services Capital Projects Fund (2015)
- Beaufort County Animal Shelter Support Fund (2013)
- Beaufort County Farm Animal Support Fund (2016)*
- Beaufort County Know2 Project Fund (2013)
- Beaufort County School District Foundation for Educational Excellence – Operating Fund (2011)
- Beaufort County Tabby House Fund (2013)
- Beaufort-Jasper-Hilton Head Alumni Chapter of Kappa Alpha Psi Fraternity, Inc. Charitable Fund (2015)

- Beaufort National Cemetery Expansion Fund (2014)
- Belfair 1811 Charitable Fund (2015)
- Broken Tails Fund (2013)
- Cathy Jean Warden Memorial Fund (2016)*
- Cars Against Cancer Fund (2016)*
- Center for Service Leadership Development Fund (2013)
- Celebrate Bluffton Fund (2014)
- Coach Claudio DiBartolomeo Youth Soccer Fund (2010)
- Coalition of Parkinson's Disease Support Groups of Beaufort County (2015)
- Coastal Empire Community Mental Health Consumer Crisis Fund (2009)
- Colleton River Plantation Club Operation Santa Claus Fund (2011)
- Betti Crosby – PEARLS Early Childhood Education Fund (2010)
- Chairmen's Award Fund (2002)
- Delta Sigma Theta Sorority, Inc. Hilton Head Island-Bluffton Alumnae Chapter Endowment Fund (2015)*
- Charles and Geraldine Doerger Fund (1995)
- Disaster Recovery and Rebuilding Fund (2004)
- Dove Street Festival of Lights™ Fund (2016)*
- DragonBoat Beaufort Fund (2012)
- Dorothy M. Falconer Charitable Fund (2003)

- Arnold Fields Community Endowment Fund (2001)
- Joseph Bacon and Carolyn Bexley Fraser Sustainable Seafood Harvest Fund (2016)*
- Elizabeth Mellard Graves Foundation for Cancer Care Fund (2009)
- Greater Bluffton Community Charitable Fund (2008)
- Greater Bluffton Community Endowment Fund (2008)
- Gullah Geechee Consortium of Beaufort County Fund (2015)
- Hampton Hall Charitable Fund (2014)
- Hampton Lake Tiger Bass Race Charitable Fund (2015)
- Hargray Caring Coins Foundation (2002)
- Healing Heroes of the Lowcountry Fund (2014)
- The Viola Hedeman Fund (2002)
- Hilton Head Island Entry Beautification Project, Inc. Fund (2014)
- Hilton Head Island Foundation Endowment Fund (1995)
- Honor Our Heroes Fund (2014)
- The David and Anne Houston Fund (2003)
- Humane Association of the Lowcountry Fund (2015)
- Island Academy of Hilton Head (2016)*
- Jasper Community Endowment Fund (2008)
- Jasper Community Operating Fund (2012)
- Frank H. and Anita L. Johnson Medical Assistance Fund (2005)
- Junior Jazz Foundation Bob Masteller Memorial Fund (2006)
- Herb King Memorial Fund (2009)
- Kiwanis Club of Beaufort Charitable Fund (2011)
- Long Cove Club Community Charitable Fund (2015)
- Long Cove Club Community Endowment Fund (2004)
- Lowcountry Alliance for Healthy Youth Fund (2013)

- Lowcountry Volunteer Connections Fund (2011)
- Martin Luther King, Jr. Celebration Fund (2015)
- Will Miles Lymphatic Research Fund (2008)
- Mission A2J – Athletes Assisting Japan Fund (2011)
- Native Islanders Charitable Fund (2016)*
- PEARLS' Girls Endowment Fund (2011)
- PEARLS of Hampton County Endowment Fund (2007)
- PEARLS of Hampton County Operating Fund (2009)
- Public Art Fund (2005)
- REALTORS® Helping REALTORS® Fund (2012)
- Rotary Club of Hilton Head Island Charitable Programs Fund (2011)
- Ruth M. Seaman Fund (1995)
- South Carolina Youth Leadership Conference Fund (2015)
- TidePointe Community Educational Fund (2009)
- Touch Tomorrow Beaufort Endowment Fund (2008)
- Touch Tomorrow Bluffton Endowment Fund (2008)
- Touch Tomorrow Colleton County Endowment Fund (2008)
- Touch Tomorrow Hampton County Endowment Fund (2008)
- Touch Tomorrow Hilton Head Island/Daufuskie Endowment Fund (2008)
- Touch Tomorrow Jasper County Endowment Fund (2008)
- Touch Tomorrow for the Lowcountry Endowment Fund (2008)
- Euline H. Van Vactor Charitable Fund (2002)
- Women of Palmetto Bluff Charitable Fund (2016)*
- Women in Philanthropy Endowment Fund (2003)
- Women in Philanthropy Operating Fund (2006)
- Youth Technology Endowment Fund (2011)

▶ DESIGNATED FUNDS

When you establish a designated fund, you choose one or more specific organizations you'd like to support. These funds are often endowed so that support can continue into perpetuity. We ensure disbursements are made to the charities you designate in the establishing fund document.

- A Call To Action Mission Support Fund (2016)*
- Opal D. Abbink Endowment Enhancement Fund (2002)
- Alzheimer's Respite and Resource Building Fund (2009)
- Ames Family Fund (2004)
- Arts Center of Coastal Carolina Endowment Challenge 2000 Fund (2001)
- The Jacqueline S. Ballantyne Designated Fund (2007)
- Beaufort County Rail Trail Fund (2005)
- Beaufort County School District Foundation for Educational Excellence Endowment Fund (2008)
- Beaufort County School District Foundation for Educational Excellence Priority Projects Fund (2008)
- Bluffton Jasper County Volunteers in Medicine Support Fund (2015)
- William and Marva Jones Brooks Park Endowment Fund (2014)
- William E. Brown, Jr. Charitable Fund (2005)
- Caring Neighbors Aging In Place Fund (2014)
- David M. Carmines Memorial Foundation Fund (2010)
- Center for Constitutional Research and Education Project Fund (2011)
- Child Abuse Prevention Association Endowment Fund (2006)

- Child Abuse Prevention Association Operating Reserve Fund (2013)
- The Children's Center Endowment Challenge 2000 Fund (2002)
- Citizens Opposed to Domestic Abuse Endowment Fund (2007)
- Colcock-Teel House Endowment Fund (2011)
- Conway-Ennen Fund (1998)
- Conway-Ennen Women's Resource Center Fund (1997)
- Daufuskie Endangered Places Fund (2015)
- Deep Well – Charlotte Heimrich Memorial Building Endowment Fund (2006)
- Don Ryan Center for Innovation Endowment Fund (2014)
- Driving Young America Fund (2007)
- Friends of the Hilton Head Island Library Endowment Fund (1998)
- Friends of the Hilton Head Library Mission Support Fund (2011)
- The Giving Marketplace Fund (2015)
- Marian G. Graham Endowment Fund (2007)
- Grassroots Leadership Development Fund (2010)
- Heritage Library Foundation - Zion Historic Site Preservation Fund (2016)*
- Higher Education Curriculum Development Fund (2014)
- Hilton Head Island Recreation Association Fund (2009)
- Hilton Head Island Water Fund (1999)
- Hilton Head Community Rowing and Sailing Center Fund (2008)
- Hilton Head Orchestra Endowment Challenge 2000 Fund (2000)
- Hilton Head Reef Foundation Fisheries Research Project Fund (2010)
- Honor Flight Lowcountry Project Fund (2010)
- Hospice Care of the Lowcountry Endowment Challenge 2000 Fund (2000)
- Hospice Care of the Lowcountry Operating Fund (2014)

Continued on the next page.

* New Funds



Island School Council for the Arts Endowment Fund (2012)
 Kiwanis Club of Hilton Head Island Fund (2006)
 Lewis Family Charitable Fund (2007)
 Literacy Volunteers of the Lowcountry Endowment Fund (2003)
 Richard D. Lundy and Virginia E. Lundy Fund (2007)
 Mitchelville Preservation Project Fund (2010)
 Sherry H. Munday Memorial Fund (1989)
 NAMI Beaufort County Fund (2005)
 The Outside Foundation Fund (2015)
 Palmetto Animal League Endowment Fund (2015)
 Palmetto Animal League Fund (2010)
 Programs for Exceptional People Building Fund (2003)
 Programs for Exceptional People Endowment Challenge 2000 Fund (2002)
 Project SAFE (Hilton Head Island Sewer Assistance Fund) (2000)
 Port Royal Sound Foundation Endowment Fund (2003)

Port Royal Sound Foundation Project Fund (2010)
 Rotary Club of Hilton Head Island Endowment Fund (2010)
 Sea Pines Montessori Academy Endowment Fund (2012)
 Second Helpings Endowment Fund (2010)
 George M. and Jane F. Simson Charitable Fund (2012)
 Strengthening Nonprofits Initiative Fund (2011)
 Strub Family Fund 2016 (2016)*
 John and Margaret Taylor Memorial Fund (2016)*
 John M. Eagan and Charlton H. Eagan Charitable Fund (2016)*
 United Way of the Lowcountry Endowment Fund (2003)
 Veterans Memorial Fund (2005)
 Volunteers in Medicine Endowment Challenge 2000 Fund (2000)
 Waddell Mariculture Center Fund (2009)
 Clarece Walker Legacy Endowment Fund (2013)
 Ella C. White Memorial Scholarship Endowment Fund (2005)
 Peter E. and Nettie Wile Charitable Fund (2006)
 YANA Club Building Fund (2000)
 YANA Mission Support Fund (2014)

► DONOR ADVISED FUNDS

These flexible funds operate similar to a personal or family foundation. You contribute to the fund and make grant recommendations to organizations that interest you. These funds can be either endowed or non-endowed.

The Annabel Elise Fund (2008)
 Thomas C. and Genevieve H. Arnold Fund (2006)
 Mary-Stuart Parker Alderman Fund (2005)
 Hannah White Barnwell Fund (2004)
 The Bethea Family Fund (2006)
 Joe and Kaye Black Family Fund (2003)
 Nancy T. and David A. Borghesi Fund (2014)
 Donald and Teresa Brashears Foundation (2005)
 Art and Jerry Brown Fund (2002)
 Bruderer Family Fund for Arts and Education (2013)
 The Coligny Fund (2006)
 Mike and Kathy Cooper Charitable Fund (2014)
 Melvin and Lou Davis Fund (2002)
 DeZeeuw-Clark Organization Fund (1998)
 Diana Family Fund (2003)
 Linda N. Dumesnil Charitable Fund (2015)
 Berry and Ruthie Edwards Giving Back Fund (2007)
 Elder Family Fund (2001)
 Fitzgerald and Forrest Charitable Fund (2011)
 Jean P. Gates Charitable Fund (2012)
 Lesley and John Gilbert Legacy Fund (2013)
 Mary Elizabeth Graves Endowment Fund (2009)
 Mark and Sue Groesbeck Fund (2010)
 Russ and Andrea Gullotti Charitable Fund (2012)
 M.I. and P.A. Harlacher Fund (2007)
 Howell Family Fund (2000)
 Jehovah Jirah Fund (2012)
 Johnsen Family Fund (2003)
 Samuel Stafford Law Jones Fund (2008)
 Dudley and Rita King Family Charitable Fund (2013)
 Landry Charitable Fund (2015)
 Beryl and Peter LaMotte Fund (2005)
 LarLyn Fund (2008)
 Lauric Fund (2014)
 C.J. Lyons Buy a Book, Make a Difference Fund (2013)
 McKay/Comes Charitable Fund (2015)
 Wayne F. and Barbara B. Miller Family Charitable Fund (2005)
 Mills Family Fund (2013)
 Giorgio Misthal Family Fund (2015)
 Ray and Linda Moloney Charitable Fund (2014)
 Bill and Carole Mottel Fund (2004)
 Noble Jonas Charitable Fund (2001)
 Peggy Parker Charitable Endowment Fund (2011)
 Parker Family Charitable Fund (2012)
 Peter and Lynn Parrott Fund (1999)
 Helen H. Payne Fund (2000)
 Reid Family Charitable Fund (2015)*
 David and Kelly Ruckno Family Foundation Fund (2007)
 Ann and Julius Scott Charity (2001)
 Catherine R. Smith Memorial Fund (2004)
 Vaughn A. Smith Memorial Fund for the Disabled (2015)
 The Strauch Family Charitable Fund (2013)
 Stuckart Family Fund (2007)
 Thomas W. and Caroline W. Tucker Family Fund (2004)
 N. Jean Washington Memorial Fund (2010)
 Joan and Wade Webster Leveraging Philanthropy Fund (2014)
 John and Beth Weymouth Family Fund (2007)
 The La Junta White Stovall Memorial Fund (1999)
 M. Worthy Charitable Fund (2008)

CONNECTING STUDENTS TO EDUCATIONAL OPPORTUNITIES



► SCHOLARSHIP FUNDS

AAUW – Hilton Head Branch Scholarship Fund for Women and Girls (2013)
 Ellie and Michael Agresta Scholarship Fund (2010)
 Beaufort County Law Enforcement Educational Scholarship Fund (2002)
 Beaufort-Jasper-Hilton Head Alumni Chapter of Kappa Alpha Psi Fraternity, Inc. Scholarship Fund (2016)*
 Fred and Susan Breidenbach Scholarship Fund (2003)
 British Open Pub Kevin Hayes Memorial Scholarship Fund (2004)
 Sarah Creech Performing Arts Scholarship Fund (2013)
 Cypress of Hilton Head Island Scholarship Program Fund (2016)*
 Delta Sigma Theta Sorority, Inc. Hilton Head Island – Bluffton Alumnae Chapter Scholarship Fund (2015)
 Dominiques Musician Corner Scholarship Fund (2016)*
 Herman K. Gaither Scholarship Fund (2006)
 Dianne K. Garnett Scholarship Fund (2006)
 Robert E. Garnett, Sr. Scholarship Fund (2010)
 Richard H. Gerken and Ann M. Gerken Scholarship Fund (2013)
 Gulfstream Aerospace Scholarship Fund (2014)
 Gulfstream Aerospace Youth Apprentice Scholarship Fund (2013)
 Gulfstream Goldie Glenn Scholarship Program (2003)
 Kathy's Race Scholarship Fund (2006)
 Jeff Katon Scholarship Fund (2008)
 James L. Krum Memorial Scholarship Fund (2004)
 Dr. Peter and Beryl LaMotte Enhanced Nursing Education Fund (2016)*
 Lucrecia C. Lester Memorial Scholarship Fund (2016)*
 Dr. Glenn Neil Love Medical Scholarship Fund (2015)
 R and J Matchett Scholarship Fund (2008)
 McClure Family Scholarship Fund (2008)
 Camden F. Moody Scholarship for Dance (2000)
 Richard R. Moore Family Scholarship Fund (2013)
 Mina Larson and Mandas Mulrain Scholarship Fund (2005)
 Oak Advisors, LLC Scholarship of Excellence (2008)
 The Ohio State University Alumni Club of Hilton Head Island Scholarship (2015)
 Okatie Rotary Club Scholarship Fund (2004)
 Parris Island Historical and Museum Society Scholarship Fund (2012)
 Alexandria Patterson Scholarship Fund (2013)
 Kate Reardon Memorial Scholarship Fund (2014)
 Smith Stearns Tennis Academy Scholarship Fund (2006)
 Joan and Wade Webster Scholarship Fund (1996)
 Reverend Isaac W. Wilborn, Jr. Scholarship Fund (2014)
 Women's Life List Scholarship Fund (2005)

As the cost of higher education continues to climb, students and their families seek ways to offset college expenses. One of the best ways to do this is through scholarships. Community Foundation of the Lowcountry has almost 40 scholarship funds to connect deserving students to post-secondary educational opportunities. Each scholarship has distinct criteria, established by the funder. When you establish a scholarship fund, you can serve in an advisory role, recommend an advisory committee, or allow the Community Foundation to select students based on criteria you develop.

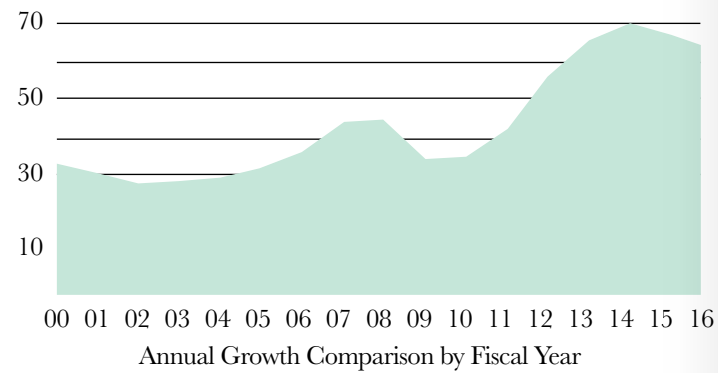
Last year, Community Foundation of the Lowcountry awarded almost \$644,000 in scholarships to 145 students who were attending one of 68 colleges or universities. If you'd like to support hardworking students through establishing a scholarship, or if you know a student who could use some help in attaining their educational dreams, contact us. We'll be happy to talk with you about our scholarships.



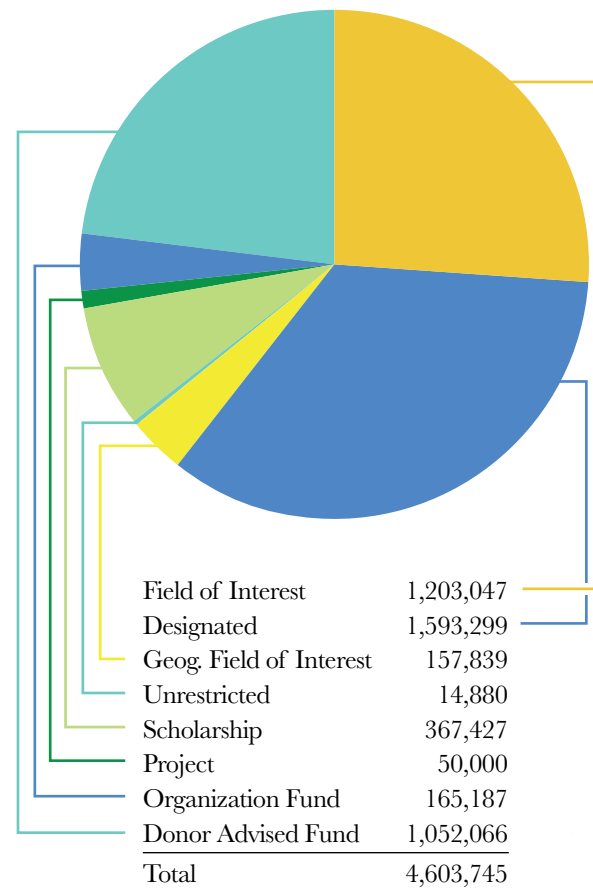
OUR COMBINED FINANCIALS

	2016	2015
ASSETS		
Cash and cash equivalents	1,762,374	1,731,501
Pledges receivable, net	140,000	140,000
Assets held - charitable remainder trusts	2,120,533	2,310,671
Investments	47,007,562	49,391,423
Capital Counsel	1,975,653	2,453,923
The Jim and Margaret Krum Foundation, Inc.	9,718,657	10,437,733
Property and equipment, net	457,295	494,470
Other assets	29,555	34,994
Total Assets	63,211,629	66,994,715
LIABILITIES		
Accounts payable and accrued expenses	102,832	64,699
Grants payable	1,694,851	2,338,373
Annuities payable	2,475,276	2,587,960
Funds held for others - agency endowments	3,067,351	3,061,774
Total Liabilities	7,340,310	8,052,806
NET ASSETS		
Unrestricted	55,871,319	58,941,909
Temporarily restricted	--	--
Permanently restricted	--	--
Total Net Assets	55,871,319	58,941,909
Total Liabilities and Net Assets	63,211,629	66,994,715
INCOME-UNRESTRICTED		
Contributions received	4,438,558	2,773,108
Net realized gains/losses	(1,656,751)	1,056,144
Net unrealized gains/losses	(1,408,075)	(2,005,906)
Investment Income	1,576,412	1,066,806
Rental income	12,300	21,285
Other	730,219	656,537
Total Revenues	3,692,663	3,567,974
EXPENSES AND SUPPORT		
Grants paid	4,201,411	3,863,384
Program Expenses	293,569	164,535
Salaries and benefits	801,580	797,793
Professional and administrative fees	1,010,936	1,011,442
Supplies and other	201,245	129,813
Fundraising	87,336	59,181
Changes in value of split interest agreements	130,001	118,971
Depreciation	37,175	37,175
Total Expenses	6,763,253	6,182,294
Increase (decrease) in unrestricted net assets	(3,070,590)	(2,614,320)
Increase (decrease) in net assets	(3,070,590)	(2,614,320)
Net assets at beginning of year	58,941,909	61,556,229
Net assets at end of year	55,871,319	58,941,909

TOTAL COMBINED ASSETS IN MILLIONS



2016 GIFTS BY FUND TYPE



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 Toni Bailey*
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* joined in June 2016

** resigned in 2016

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 Independent Auditors: Lucas and Associates
 Investment Consulting Firm: Fund Evaluation Group

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