Our Vision

We imagine a Mississippi where every community is connected to the resources, knowledge, and tools to create meaningful and lasting change – for Mississippi, for good. Forever.

Our Mission

The Community Foundation for Mississippi connects donors, communities, and nonprofits to make meaningful and lasting change – for Mississippi, for good. Forever.

Our Core Values

In our stewardship, operations, service, governance and leadership, we value and have an absolute commitment to: Community, Excellence, Integrity, Expertise and Constancy.

Community Foundation for Mississippi
For Mississippi. For Good. Forever.
Sometimes what we're able to invest might seem like a mere drop in a river of needs for our community. But even the smallest drop has a ripple effect that can reach far and wide, and sometimes, those ripples change the current.

Over the past 25 years, we have worked with donors and organizations to create thousands of small ripples that continue to influence the currents in this state and across our country. The stories featured in this year's annual report demonstrate how a combination of imagination, charitable gifts, and grit can help start and sustain transformation in a community.

Each of the organizations and projects whose stories we tell here has been supported through the John F. and Lucy Shackelford Fund—a bequest which is being used to revive the spirit of community in and around downtown Jackson. Their stories show another common thread. A small group of passionate people formed to address these issues first and imagined a future full of hope and possibility. To turn possibility into reality, these everyday people invested in organizations and efforts they believed in, providing support and setting things in motion. These investments your community foundation has made have helped devoted staff members, volunteers, and organizations do more of what they do best: building a brighter future for our children, families, and communities.

We are privileged to play a role in building this future, and we hope in these pages you will see how YOU continue to act with the Community Foundation for Mississippi, to support programs and projects that are For Mississippi, For Good, Forever.

Sincerely,

Jane Alexander
President and CEO
THE JOHN AND LUCY SHACKLEFORD CHARITABLE FUND

Established by a transformative bequest from John and Lucy Shackelford to the Community Foundation, this board-restricted fund supports projects intended to improve the livability of the community, with specific emphasis on the area in and around downtown Jackson.

The five organizations featured in this report received grants from the John and Lucy Shackelford Charitable Fund this year. They are the Greater Jackson Arts Council, the Greenwood Cemetery Association, the Mississippi Museum of Art, the Oaks House Museum, and Operation Shoestring.
GREATER JACKSON ARTS COUNCIL
Renovation of the Arts Center of Mississippi
$250,000 over two years

GREENWOOD CEMETERY ASSOCIATION
Infrastructure, preservation, and feasibility plans
$30,000

MISSISSIPPI MUSEUM OF ART
Creative Corridor construction
$180,000 over two years

OAKS HOUSE MUSEUM
Foundation repair and HVAC replacement
$40,000

OPERATION SHOESTRING
Capital Campaign
$150,000 over two years
NEW FUNDS

The Community Foundation for Mississippi is pleased to welcome these new funds for the 2018-2019 fiscal year:

• Brian T. Fenelon Charitable Fund
• Community Foundation for Mississippi Fund
• Chastain Middle School Athletics Fund
• FFV Incentive Program Fund
• Forward Mississippi Fund
• Frances and Cooper Morrison Charitable Fund
• Fred and Pamela Banks Charitable Fund
• Greenwood Cemetery Association Endowment Fund
• LGBTQ Endowment Fund/Mississippi
• Mississippi Justice Film Fund
• Mississippi Writers’ Trail Charitable Fund
• Pam Swanson Memorial Fund for Animals
• Serve to Be Free Fund
• Together We Rise Fund
The Community Foundation for Mississippi has had a tremendous impact on the work that I’ve been able to do in the City of Jackson, specifically through the Imagine Downtown Fund and the John F. and Lucy Shackleford Fund. Investments in placemaking and strategic progressive and innovative interventions into the fabric of downtown sets the stage for similar work and progress to be made all over the city of Jackson. Giving matters, and it makes a real difference. **Much of the energy and excitement in and around downtown stems from the small but high-impact work that we have been doing with the Community Foundation for Mississippi.** Without the donors to back these projects, we wouldn’t be able to accomplish this type of work.

- David Lewis, deputy director of cultural services
  
  City of Jackson
We received a grant from the Community Foundation for Mississippi to renovate the Museum’s ‘creative corridor’ that extends from the Museum’s Art Garden to the Westin Hotel. The $180,000 gift from the Shackleford Fund transformed the corridor, now called The Art Alley, into a safe, well-lit, and tranquil path. Community foundations like the Community Foundation for Mississippi play a key role in identifying and solving community problems. By bringing together the resources of individuals and businesses alike, they support the arts, education, health care, and the general well-being of our communities.

- Betsy Bradley, director
  Mississippi Museum of Art
COMMUNITY IMPACT

583 GRANTS
$3.24M TOTAL GRANTS

GRANTS BY PROGRAM AREA

- ARTS AND CULTURE: 27%
- EDUCATION: 22%
- HEALTH: 16%
- COMMUNITY DEVELOPMENT: 12%
- RELIGION: 10%
- HUMAN SERVICE: 7%
- PHILANTHROPY: 3%
- PUBLIC AFFAIRS: 1%
- OTHER: 3%

GRANTS BY TYPE OF FUND

- DONOR ADVISED: 39%
- DESIGNATED: 25%
- UNRESTRICTED: 19%
- FIELD OF INTEREST: 16%
- SCHOLARSHIP/AWARD: 1%
Greenwood Cemetery is unique in its role as Jackson’s oldest historic landmark and its original graveyard. The Shackelfords’ extraordinary gift and the vision of beautification of downtown Jackson have been a game-changer. Funding for historic cemeteries is very hard to find. Donations to the Greenwood Cemetery Fund at the Community Foundation for Mississippi will ensure that improvements made now will be maintained in the future.

- Cecile Wardlaw, president
Greenwood Cemetery Association
The grant from the John F. and Lucy Shackleford Fund was given to make critical structural improvements to the Oaks House Museum and preserve this unique historic structure. The museum educates visitors about the early history of Jackson and provides educational programs in an environment that allows visitors to experience 19th-century life. The Community Foundation for Mississippi stimulates charitable giving for projects in our community and others nearby that all Mississippians can appreciate and enjoy.

- Linda Thompson Robertson, volunteer
  Oaks House Museum
NONPROFIT PARTNERS

The Foundation holds the endowments and special funds for these nonprofits, providing operating sustainability.

Clinton Community Nature Center
Clinton Library Foundation
Extra Table
Fondren Renaissance Foundation
Fondren YANA Enhancement Group, Inc.
Foundation for the Mid-South
Friends of Thalia Mara Hall
Greater Belhaven
  Neighborhood Foundation
Jackson Free Clinic
Jackson Zoological Society
Jackson-Hinds Library System
Junior League of Jackson/
  UMC Children's Cancer Clinic
L.I.F.E. of MS, Inc.
Magnolia Speech School
Mississippi Animal Rescue League
Mississippi Bicentennial
  Organizing Committee
Mississippi Book Festival
Mississippi Boychoir
Mississippi Center for Nonprofits
Mississippi Children's Museum
Mississippi Food Network
Mississippi Heritage Trust
Mississippi Institute of Arts and Letters
Mississippi Museum of Natural
  Science Foundation
Mississippi Nurses Foundation
Mississippi Opera Association
Mississippi Public
  Broadcasting Foundation
Mississippi Symphony
  Orchestra Foundation
Mother's Milk Bank of Mississippi
Mississippi Chambre Music Guild
Mustard Seed
New Stage Theatre
Parents for Public Schools National
Stewpot Community Services
Stricker Foundation/Community Place
The Redeemer's School
Welty Biennial Corporation
Women's Fund of Mississippi
The generous $150,000 grant from the John F. and Lucy Shackleford Fund at the Community Foundation for Mississippi was part of our $2.7 million capital campaign to completely renovate our 14,000 square-foot building and playground in the heart of Jackson, allowing us to serve more children more effectively. Our renovated space creates a safe place for kids and families that will empower their future growth and development while serving as a model to the state for how to invest in a community structure that helps catalyze measurably impactful positive development. This gift isn’t charity. It’s an investment in the kids, families, and neighborhoods of central Jackson—and our larger community.

- Robert Langford, executive director
  Operation Shoestring
STRATEGIC PLAN

This year the Board of Trustees embarked on a new strategic plan crafted over the course of a year to guide the Foundation. The goal of the plan is to establish the Foundation as "the trusted place to explore ways to create lasting change in communities, connect to community partners, and use philanthropic resources for good, forever." Three strategic directions, outlined at right, provide the framework for the future.

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OUR MISSION

We connect donors, communities, and non-profit organizations to make meaningful and lasting change – for Mississippi, for good. Forever.

OUR CORE VALUES

In our stewardship, operations, service, governance and leadership, we value and have an absolute commitment to:

- COMMUNITY
- EXCELLENCE
- INTEGRITY
- EXPERTISE
- CONSTANCY
OUR STRATEGIC DIRECTIONS

ADVANCING PHILANTHROPY
Attract an expanded and diverse group of donors who have a strong desire to strengthen their communities.

- Establish and maintain trust with the public and constituent groups.
- Build relationships with donors.
- Build relationships with professional advisors.
- Reach prospective donors in new service area.
- Increase assets through more funds, donors and planned gifts.

EFFECTIVE AND EXPERT GRANTMAKING AND LEADERSHIP
Demonstrate expertise and leadership in the community and communicate impact.

- Serve as a convener and connect donors with community vision and needs.
- Educate donors about the Foundation, the community, grantees and best practices.
- Educate grantee organizations and work to build capacity in the charitable sector.
- Tell donor and grantee stories to public and constituent groups.

STRENGTH AND STABILITY
Secure future sustainability, develop capacity to provide service to current and future donors and establish a presence in expanded area.

- Create and fund an operating endowment.
- Ensure CFM fee structure is competitive and covers costs for all types of funds.
- Gauge donor satisfaction, using data to improve service.
- Reach new counties and solidify CFM's reputation in existing markets, as the primary charitable partner in our service area.
ASSETS

$54.78 MILLION
ASSETS UNDER MANAGEMENT

1.4%
OPERATING EXPENSES AS A PERCENTAGE OF TOTAL ASSETS

ASSETS BY TYPE OF FUND

DESIGNATED 38%
DONOR ADVISED 33%
UNRESTRICTED 20%
FIELD OF INTEREST 8%
SCHOLARSHIP/AWARD 2%

ENDOWED
$25,918,673

NON-ENDOWED
$28,857,947
2018-2019
ANNUAL SUPPORT

Corporate Partners - $10,000 +

Ballew Wealth Mgt.
Entergy Mississippi
Eleanor B. Weaver

$5,000- $9,999

BKD, LLP CPAs
The Wesley A. Caldwell Foundation
Kane and Betsy Ditto Charitable Fund
First Commercial Bank
Jan F. Lewis
Mike McRee
Frances and Cooper Morrison
Jon and Pam Turner
Kathryn L. Wiener
Kelley and Jean Williams Family Fund

$2,500 - $4,999

Cynthia B. Adams Charitable Fund
Jim and Suzanne Almas
BankPlus
Baptist Health Systems, Inc.
Butler Snow, LLP
Community Bank of Mississippi
Dr. William Cooley
M and J Creekmore Foundation
Will and Monica Crossley
Lynn Crystal
Larry W. and Pamela B. Edwards Charitable Fund
Mr. and Mrs. Lawrence Farrington
Janet Harris
Katy and Jamie Houston
Dr. and Mrs. John Isaacs
Jones Walker, LLP
Chuck Lathem
Mr. and Mrs. Con Maloney
Susan and Hibbett Neel Charitable Fund

$1,000 - $2,499

Michael T. McRee
Charitable Fund
Janet and Luther Ott Charitable Fund
Cynthia and Hugh Parker
David Pharr
Renasant Bank
Mr. and Mrs. E. B. Robinson, Jr.
Asoka and Seetha Srinivasan
Strategic Resource Management
Mr. and Mrs. Stacy E. Thomas
David J. VanLandingham
Mr. and Mrs. Kenneth E. Windham

$500 - $999
Mr. and Mrs. T. Brent Alexander
Pam and David Allen
Dr. and Mrs. Vinod Anand
Baton Rouge Area Foundation
LeAnne and Allen Brewer
Tam and Nora Etheridge
Wesley and Dolly Goings
John and Martha Hill
Tom and Cathy Johnson
Jerry Johnson and Louisa Dixon
Johnny and Sharon Maloney
Howard and Mary Eliza McMillan Foundation
Nora Frances and Vaughan McRae
Jenny Moffitt
Mississippi Blood Services, Inc.
Lisa and Chuck Nicholson
Don and Becky Potts
Raymond James Charitable Fund/
Arty and Amy Finkelberg
Carlton Reeves
Sharing God's Gifts Charitable Fund
Gaines and Lynn Sturdivant
The Honorable and Mrs. James C. Sumner
Jan and Andrew Townes
Karen and Paul Varner
Mary and Wirt Yerger Charitable Fund

$250 - $499
Jim and Carey Armstrong
Barbara Austin
Fred and Pamela Banks
Mary and Alton Cobb
Bill and Myra Cook
Elizabeth Copeland
Dr. and Mrs. Suman Das
Pamela and John Downer
Judy and Charles Ferguson
Dean and Jane Gerber
Collier and Beth Graham
Dick and Jennifer Hall
Peder and Jennifer Johnson
Susan Shands Jones
Leila and Sam Lane
JLM Consulting, James L. McArthur
Virginia J. Payne, M.D.
Anne and Alan Perry
Drs. Tom and Deborah Skelton
Bill and Carol Sneed
Mr. and Mrs. Stephen M. Stewart
Van Skiver Financial Services, LLC
Judy and Josh Wiener
Dudley and Julie Wooley
Steve and Chris Zachow

$25 - $249
Dr. and Mrs. Barry B. Aden
Barbara Alexander
Betty and John Allin
Jackie Bailey
Jim Barfield
Ruth and Carl Black Charitable Fund
Dr. and Mrs. Richard L. Blount
David Bowen
Thorne and Kelly Butler
Mrs. Natie P. Caraway
Jack and Sigrid Conway
Cox Designs, Inc.
Mr. and Mrs. C. York Craig Jr.
Margaret Oertling Cupples
Steve Davis
Jackson MS Alumnae Chapter Delta
Sigma Theta Sorority, Inc.
Dr. and Mrs. Edwin Dodd
Richard and Joyce Dortch
Episcopal Diocese of Mississippi
Mr. and Mrs. Slade F. Exley
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Jack and Shirley Geary
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William M. Heller
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Cecile and Bill Wardlaw
Betti and Walker Watters
Glenn Watts
Dolphus and Rosie Weary
Dr. and Mrs. Allen Yates
The Legacy Society recognizes those who have included the Foundation in their wills or other deferred giving plans or who have established permanent funds at the Foundation. If you want to create a legacy for the causes you love, CFM will work with you to design a custom solution. Call us to start the conversation.

Anonymous (2)  
Dian Anderson  
Kane and Betsy Ditto  
Ms. Jan Magee Evers  
Slade and Susan Exley  
Mrs. Meyer Falk  
Angela M. Gobar  
Ms. Nan G. Goodman  
Lora and Charles Griffin  
Peggy Huff Harris  
Jane and Wood Hiatt  
Bill Hunsberger Family  
Nellie B. Hutchison  
Andrew A. Irby  
Charles L. Irby Jr.  
Natalie R. Irby  
Stuart M. Irby Jr.  
Peder R. Johnson  
Angelina G. Kitchens  
Mrs. Ray Layton  
Jeanne Luckett  
Dr. and Mrs. Raymond S. Martin Jr.  
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Dr. Satnam Sethi Family  
John and Lucy Shackelford  
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Seetha and Asoka Srinivasan  
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Mr. and Mrs. Mat Thomas  
Suzanne and Pat Vivier  
Holly Wagner and Jere Nash  
Eleanor and Robert Weaver  
Wells Marble & Hurst Fund  
Julian and Kathryn Wiener  
Jean and Kelley Williams  
Linda and Wirt Yerger
Members of the Golden are attorneys, accountants, and financial advisors who have helped their clients achieve more through philanthropy by partnering with the Community Foundation. We gratefully acknowledge their ongoing commitment to strategic charitable giving.

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James K. Dossett, Jr.  

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Melanie S. Woodrick  
*Grantham Poole PLLC*

R. James Young  
*Wells Marble & Hurst*
Pam Swanson loved animals. For years, she and her best friend Monnie Armstrong bought supplies, crates, and food and donated them to animal shelters in need. When she died, her husband Jerry established the Pam Swanson Memorial Fund for Animals at the Community Foundation for Mississippi to continue that practice in her memory. Today, with Monnie's help, the Swanson fund actively meets the needs of animal shelters throughout central Mississippi, providing funds for emergency veterinary care and supplies.

For a full list of donors to the Pam Swanson Memorial Fund, and other gifts made in memory or in honor of someone visit our website www.formississippi.org.
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Director of Finance
Community Foundations 101

What We Do
Community foundations build endowments that serve the community and its charitable organizations. That’s why we say, "For Good. Forever." If United Way is the community checking account, we are the community retirement account.

Did You Know
Attracting funds, particularly endowed funds, is our purpose. We have many types of donors and many types of funds, too.

Perpetually Local
The defining characteristics of a community foundation are that we are designed to exist in perpetuity, and our Board can and will ensure charitable dollars are always directed toward the community’s needs.

Why We Exist
Community foundations were invented in 1914, by a bank trust officer who was concerned that many charitable trusts paid out nothing to charity – because the intent of the trust was narrowly drawn, distributions could (literally) not be made. The solution? The community foundation, with boards which have the ability to insure charitable dollars are able to serve community needs. Forever. No matter what may change in society.

About Us
Because we are a 501(c)3 organization, each year the Community Foundation files Form 990 with the IRS, our tax return. We register as a charity with the Mississippi Secretary of State's office. We have an extensive annual audit, and our audited financials are posted publically.
The Highest Standards for Philanthropy

The Community Foundation for Mississippi is nationally recognized for meeting the highest standards for giving, and is accredited with National Standards for U.S. Community Foundations™, a program that establishes legal, ethical, effective practices in philanthropy for community foundations across the U.S.

The National Standards Seal is an indication of our commitment to excellence, maintaining sound policies and responsible practices for the public good.

For Mississippi. For good. Forever.