

J. Marion Sims Foundation



Annual Report 2012

Mission

The Foundation's mission is to support programs and projects of prevention and education that enhance the health and wellness of the citizens of Lancaster County and the communities of Great Falls and Fort Lawn, South Carolina.

Contents

Chairman's/President's Letter.....	1
Priorities & Guidelines.....	2
Adult Literacy & Basic Skills Initiative Grants.....	4
Responsive Grants.....	5
Teachers Pet Grants.....	7
Standing Committees.....	8
Financial Statements.....	9

J. Marion Sims Foundation

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Chairman's/President's Letter



Seated: R. Malcolm Edwards
Standing: James T. Morton

From support for medical care, health education, and literacy to funds for food, water safety, and shelter, the J. Marion Sims Foundation made grants to a wide range of community organizations in 2011-2012.

As Lancaster County, Great Falls and Fort Lawn slowly and painstakingly make their way out of the recession we are reminded that their needs are still great, and that their people are still caring, resilient, and strong. The organizations we funded exhibit these same characteristics.

We are mindful of the good and hard work of the people and organizations of our area and we take the responsibilities of awarding grants seriously and with humility. We are grateful for opportunities to help and look forward to continuing that work as our communities progress in the years ahead.

Sincerely,

R. Malcolm Edwards
Chairman

James T. Morton
President

Priorities and Guidelines

THE J. MARION SIMS FOUNDATION INVITES APPLICANTS
FOR ITS RESPONSIVE GRANTS TO SUBMIT INNOVATIVE IDEAS IN THE AREAS
OF PREVENTION AND EDUCATION TO ENHANCE HEALTH AND WELLNESS IN
LANCASTER COUNTY, GREAT FALLS, AND FORT LAWN, SOUTH CAROLINA.

Interested candidates should call the foundation to schedule a pre-application meeting to be held no less than 30 days prior to the April 15 and October 15 responsive grant application deadlines. The foundation has closed its Adult Literacy and Basic Skills Initiative to new applicants and is focusing its efforts on working with programs to which it awarded grants from 2002-2004.

Funding Priorities

- ❖ The beneficiaries of the grant must be located in Lancaster County, Great Falls, and/or Fort Lawn, South Carolina.
- ❖ The foundation will give priority to grant applicants for programs of community service that provide ongoing support.
- ❖ The foundation seeks to make grants that will have significant and lasting impact on the community.
- ❖ Potential grantees are encouraged to propose innovative collaborations and partnerships that respond to community needs.
- ❖ Proposals should emphasize preventive health care and creative ways of solving long-standing health and wellness concerns.
- ❖ The foundation will favor proposals for specific projects, rather than general operations.

Priorities and Guidelines

Funding Guidelines

- ❖ Awards can be granted only to organizations and institutions exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code.
- ❖ All grants will be in accordance with the foundation's status as a tax-exempt 501(c)(3) organization.
- ❖ Single-year and multi-year grants will be awarded. "Seed grants" will not exceed three years.
- ❖ While the foundation places no limit on the amount that can be requested, trustees will consider the availability of funds and the impact of a large request.
- ❖ Since the foundation's board of trustees feels strongly that the orientation of grants should be in the area of projects and programs, funding in the following areas may be limited:
 - Operations
 - Capital improvement projects
 - Scholarships, conferences, or seminars that result only in professional advancement but provide no benefit to the greater community
 - Seed grants that do not address an urgent community need and do not demonstrate the potential for ongoing community support

The foundation does not make grants to or for:

- ❖ Individuals
- ❖ Indirect costs, including payments of a percentage of a grant to a local organization's national affiliate
- ❖ Indigent care
- ❖ Programs or projects generally considered to be the role of government
- ❖ Endowments
- ❖ Loans
- ❖ Retire accumulated debt
- ❖ Projects of organizations that primarily benefit their own members or adherents
- ❖ Tickets to charitable events or dinners
- ❖ Legislative lobbying or other political purposes

Adult Literacy and Basic Skills Initiative Grants

The foundation has long held the belief that better health outcomes can be obtained through increased literacy, as research has established a direct correlation between people’s literacy and their health as measured by a broad range of indicators. In 2011-’12 the foundation continued its Adult Literacy and Basic Skills Initiative begun in 2002*. Now in its third grantmaking phase, the initiative provides two-year challenge grants, requiring matching funds to be raised by the 11 grantee organizations (from the original cohort of 15) still operating literacy programs.

In 2011-’12 the foundation awarded four challenge grants totaling \$295,248 to:

Chester County Literacy Council	\$69,900 two-year challenge grant for its “Literacy 101/GAPP” workplace literacy program.
The Children’s Council	\$94,852 two-year challenge grant for its “Skills for Success” family literacy program.
Faith, Hope, and Victory Christian Church	\$57,459 two-year challenge grant for its “Community Powerhouse” family literacy program.
Lancaster County Literacy Council	\$73,037 two-year challenge grant for its “Reading for Workplace Success” workplace literacy program.

*For more information about the Adult Literacy and Basic Skills Initiative, please see the foundation’s three and six-year review publications at www.jmsims.org.

Responsive Grants

THE FOUNDATION ALLOCATES A SIGNIFICANT PORTION OF ITS GRANT MAKING DOLLARS FOR AWARDS IN RESPONSE TO NEEDS IDENTIFIED BY VARIOUS COMMUNITY ORGANIZATIONS AND AGENCIES IN ITS GIVING AREA.

In 2011-'12 Responsive Grants totaling \$968,024 were awarded to:

Alston Wilkes Society	\$5,000 for its program of preparing offenders to re-enter society and meet their basic needs upon re-entry
Upper Piedmont Chapter American National Red Cross	\$10,000 for one year to provide emergency assistance to Lancaster County families who are victims of fires and other natural disasters
CareNet	\$430,491 for one year to fund operational costs of its Care Health Center that provides comprehensive medical services for area residents regardless of the ability to pay
Catawba Care Coalition, Inc	\$35,000 for one year to provide education and treatment services for citizens with HIV/AIDS in Lancaster County, Great Falls, and Fort Lawn
Chester County School District	\$47,709 for one year for its "Save our Students (SOS)" program at Great Falls Middle School and Great Falls High School
Children's Attention Home	\$9,325 for one year for its residential program
Christian Services of Lancaster	\$50,000 for one year for its food pantry that provides food assistance for low-income families
Columbus Parker Track Club	\$20,000 for one year for its health and character-building program for local youth

Responsive Grants

Communities in Schools-Chester

\$10,000 for one year for its 7-Day Health and Wellness Project to address the psychosocial and nutritional needs of students from Great Falls and Fort Lawn

Family Promise of Lancaster County

\$20,000 for one year to fund operations associated with helping church congregations provide shelter and meals for families who are without housing

Good Samaritan Medical Clinic

\$35,000 for one year to provide free healthcare services to indigent patients from Lancaster County, Great Falls, and Fort Lawn

Lancaster County School District

\$55,000 for one year for its “Swimming and Water Safety Program” to provide all fourth grade students swimming and water safety instruction

Lancaster Fatherhood Project

\$50,000 for one year to support its program of helping low-income, non-custodial fathers become better parents of their children and to improve health outcomes among clients

Life Skills Opportunity Corporation

\$28,000 for one year to provide parenting education classes and other resources to teenage parents and to help pay for childcare so that young parents can remain in school after their children are born

Palmetto Citizens Against Sexual Assault

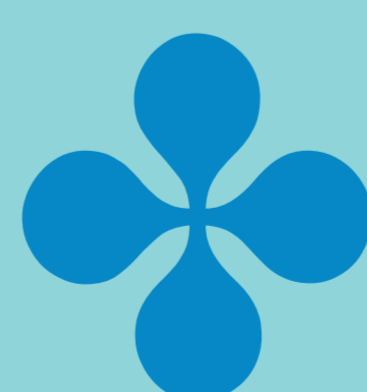
\$33,000 for one year for its “Children’s Advocacy Center Forensic Interviewer”

USC Lancaster

\$120,600 for one year for the Diabetes Education Clinic’s programs of self-management education and patient assistance

Winthrop University

\$9,655 for its Certificate in Non-Profit Management program for local nonprofit organization administrators



Teachers Pet Grants

The foundation offers certified education personnel in Lancaster County, Great Falls, and Fort Lawn the opportunity to apply for grants of up to \$500 during the school year to develop and utilize creative, innovative, short-term projects that enhance the existing instructional program. Applicants are limited to one approved grant per school year.

In 2011-'12 the foundation awarded 226 Teachers Pet Grants totaling \$104,916. These grants bring the total of Teachers' Pet awards to 1,514 grants awarded for approximately \$692,000 since the program's inception.

The foundation continues to offer this program with the aim of inspiring and encouraging creative concepts that have the potential for enhancing community life through the education of youth.

The following schools were awarded Teachers' Pet Grants during 2011-'12:

LANCASTER COUNTY

A.R. Rucker Middle School
Andrew Jackson Middle School
Andrew Jackson High School
Brooklyn Springs Elementary School
Buford Elementary School
Buford Middle School
Buford High School
Clinton Elementary School
Discovery School
Erwin Elementary School
Heath Springs Elementary School
Indian Land Elementary School
Indian Land Middle School
Indian Land High School
Kershaw Elementary School
McDonald Green Elementary School
North Elementary School
South Middle School

CHESTER COUNTY

Great Falls Elementary School
Great Falls Middle School
Great Falls High School
Lewisville Elementary School
Lewisville Middle School
Lewisville High School

Standing Committees

Audit

TRUSTEE MEMBERS:

Charles M. Harrell (Chair)
Robert K. Folks
Hubert F. Mobley

Executive

TRUSTEE MEMBERS:

R. Malcolm Edwards (Chair)
Robert K. Folks (Vice-Chair)
Pamela Y. Temple (Secretary)
Phyllis B. Bunkley (Treasurer)

Finance & Investment

TRUSTEE MEMBERS:

Stanley D. Johnson (Chair)
Miriam M. Boucher
Phyllis B. Bunkley
R. Malcolm Edwards (ex-officio)
Timothy H. Hallman
Marvin L. Starks
Pamela Y. Temple

Finance & Investment

NON-TRUSTEE MEMBERS:

Tony Gilreath

Grants

TRUSTEE MEMBERS:

Miriam M. Boucher (Chair)
R. Malcolm Edwards (ex-officio)
Robert K. Folks
Charles M. Harrell
Polly C. Jackson
Stanley D. Johnson
Hubert F. Mobley
Pamela Y. Temple

Grants

NON TRUSTEE MEMBERS:

Courtney Catledge
Donna Herchek
Debra P. Jaillette

Board Development

TRUSTEE MEMBERS:

Polly C. Jackson (Chair)
Phyllis B. Bunkley
R. Malcolm Edwards (ex-officio)
Robert K. Folks
Stanley D. Johnson

STATEMENTS OF FINANCIAL POSITION

DECEMBER 31, 2012*

ASSETS	2012
Cash and cash equivalents	\$ 152,622
Investments, at fair value	64,605,098
Prepaid expenses and other assets	395,141
Property and equipment, net of accumulated depreciation of \$308,239	<u>924,983</u>
TOTAL ASSETS	\$ 66,077,844
LIABILITIES	
Accounts payable	\$ 31,521
Compensation and other accrued expenses	\$ 68,805
Federal excise taxes payable	\$ 77,620
Deferred excise tax	\$ 96,774
Grants payable	<u>\$ 538,024</u>
Total liabilities	\$ 812,744
NET ASSETS	
Unrestricted	<u>\$ 65,265,100</u>
TOTAL LIABILITIES AND NET ASSETS	\$ 66,077,844

STATEMENTS OF ACTIVITIES

YEAR ENDED DECEMBER 31, 2012*

	2012
SUPPORT	
Investment income (loss) and net appreciation (depreciation)	<u>\$ 13,235,132</u>
EXPENSES	
Grant expenses	\$ 1,674,130
Program operating and investment expenses	\$ 1,705,655
Federal excise tax	\$ 83,500
Deferred excise tax (benefit)	<u>\$ 174,080</u>
TOTAL EXPENSES	\$ 3,637,365
Net increase (decrease) in unrestricted net assets	\$ 9,597,767
RESTATED UNRESTRICTED ASSETS BY	
\$133,553 INCREASE, BEGINNING OF YEAR	\$ 55,667,333
NET ASSETS AT END OF YEAR	\$ 65,265,100

*The foundation has changed its fiscal year end from September 30 to December 31