



*For 20 Years:  
Connecting People Who Care  
With Causes That Matter*

The Mission of the **Community Foundation of the Eastern Shore** is to strengthen our community by building charitable endowments, maximizing benefits to donors, making effective grants, and providing leadership to address community needs.

**The Community Foundation of the Eastern Shore**  
*20 years of connecting people who care with causes that matter*

Year	Assets/Millions	Gifts/Millions	Grants/Dollars	Grants/Number
2004*YTD	\$42	\$4	\$1,333,453	493
1999	\$22.8	\$3.9	\$1,200,000	564
1994	\$6.9	\$1.7	\$660,000	475
1989	\$1.1	\$1.1	\$235,000	350
1984	\$0.01	\$0.01	0	0
<b>Cumulative Total</b>	<b>\$42</b>	<b>\$34.77</b>	<b>\$17,338,703</b>	<b>8,932</b>

*\*2004 Fiscal Year to Date: July 2003 - February 2004*

**1982:** Greater Salisbury Committee Executive Director Bob Cook attends at community foundation conference in Wye Mills, Md.

**Later that year:** A steering committee formed by the Greater Salisbury Committee agrees a community foundation is viable on the Lower Shore.

**1983:** Greater Salisbury Committee members pledge \$1.3 million to the Foundation, including a \$1 million promise from Richard A. Henson.

**W**hen Bob Cook's phone rang one day in 1982, he could not have known that he was about to embark upon a journey which would touch the lives of nearly every person on the Lower Eastern Shore, involve thousands of donors and distribute more than \$17 millions in grants and scholarships, harness the enormous philanthropic capacity of local leadership, and become, 20 years later, a \$42 million force for good, for ever.

On the other end of the line that day was Jim Nelson, president of what was then the Wye Institute, inviting his friend Bob Cook, the executive director of the Greater Salisbury Committee, to sit in on a national conference of community foundations at what is now the Aspen Institute.

Salisbury, Mr. Nelson thought, might want to start a community foundation.



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*Frank Morris, Bill Rictor, Dave Rodgers, Ginny Korff, Dick Henson and Marianna Holloway met in the Foundation's first office.*

Like many folks on the Lower Eastern Shore at that time, Cook had never heard of a community foundation. Still, he accepted the offer, and spent three days learning from staff from venerable foundations such as the New York Community Trust, the San Francisco Community Foundation and the Cleveland Foundation, the last of which is the nation's first community foundation.

The brainchild of Cleveland banker and attorney Fredrick Harris Goff, the Cleveland Foundation was established in 1914 to allow charitable individuals to establish permanent funds, which would provide grants to benefit the community. Goff's idea was "new" in two ways. First, it gave an opportunity to anyone of any means to contribute towards improving the quality of life in their community in a lasting way. And secondly, Goff's idea to separate "funds management" from "grant distribution" created a new breed of charitable organization, which would specialize in distributing money earned by those funds for community improvement.

Goff's idea appealed to Cook. Enthused about the possibility, he returned to Salisbury and floated the idea to the Greater Salisbury Committee in a survey. His enthusiasm, apparently, was contagious: Members not only gave the project a green light, they pledged well over a million dollars to seed the foundation's asset base. Support came from all over for the project, including consultations from a Wilmington, Del., attorney and a New Hampshire community foundation – all pro bono. Dresser Wayne put up the visitors in their guest house. "Another very helpful consultant was Richard Bailey, who was director of the Peninsula United Methodist Foundation," Cook recalls.

Over the next two years, Cook and Greater Salisbury Committee members Oscar Carey and David Stein developed a plan to establish the foundation, give it a name, and establish its geographic scope and mission. The Salisbury Regional Community Foundation was incorporated in 1984 to serve the Greater Salisbury area.

Bob Cook was the Foundation's first executive director. As the Foundation grew, Richard Bailey's son Mark Bailey was brought on as part time executive director, in an executive-sharing arrangement with the Delmarva Council of the Boy Scouts of America.

**1984:** Community Foundation is incorporated to serve Somerset, Wicomico and Worcester counties. Bob Cook is named executive director.

**First Board includes** Oscar Carey, Frank Morris, Howard Hayman, Herb Fincher, Richard Henson, Thomas Hershey, John Hess, Sr., Marianna Holloway, Virginia Korff, and Richard Wooten.

**Late 1984:** Mark Bailey is hired as new executive director; Linda Hutchinson (formerly Linda Anderson) is hired as administrative assistant.

“Bob Cook and his organization initiated and enabled the Foundation to have continuity and a home during the startup years,” Bailey says. “Financially it would have been challenging to have been on our own and Bob and his staff’s knowledge of the people and community were wonderful assets. We were located in a one-room office just down the hall from Cook’s office.”

Oscar Carey was one of the first to sign on to the vision. As chairman of the steering committee charged with studying the feasibility of creating a community foundation, his careful research confirmed its viability, and he served as the first Chairman of the Board of Directors from 1984 until 1987.

“From its beginning in 1984, the Foundation has been wisely, and affectionately, served by an extraordinary group of individuals, the first of whom is Oscar Carey,” recalls Lucy Mohler, who served as the Foundation’s executive director from 1988 to 1993. “He quietly, yet steadfastly, laid the groundwork for the Foundation, including providing an administrative endowment fund to secure its future. His characteristics of integrity and philanthropic spirit remain a cherished part of the Foundation’s legacy.”

At the end of the Foundation’s first fiscal year, the Foundation’s financial assets amounted to \$16,739. A year later, the Foundation coffers had increased to \$134,396, and Linda W. Hutchinson was brought on as an administrative assistant.

“In October of 1985, just before I began, Dick Henson announced that he planned to contribute \$1 million to the Community Foundation in five annual installments,” Ms. Hutchinson remembers. “He made his initial contribution of \$200,000 that month. We were really on our way!”

Buoyed by Richard A. Henson’s generosity – and motivated by his challenge to match his gift – the staff and board of the young community foundation began sharing their story and the assets began to grow by leaps and bounds. By 1986, the Foundation closed the fiscal year with assets of almost \$1.3 million.



Cook

**The Early Years**

The “homework” involved in starting a new nonprofit organization kept the staff busy. The Foundation’s first Board of Directors was elected, including Oscar Carey (president), Frank Morris (vice president), Howard Hayman (secretary / treasurer), Herb Fincher, Dick Henson, Tom Hershey, John Hess, Marianna Holloway, Ginny Korff and Dick Wooten. Many of these founding fathers and mothers had been introduced to the community foundation concept through their affiliations with the Greater Salisbury Committee. Their enthusiasm and dedication fostered the foundation from a fledgling nonprofit to a burgeoning force for improving the community, as the volunteer board accepted fundraising and public relations duties and made personal commitments of time and personal resources.

Eager to demonstrate to the community a key purpose of the Foundation, the board awarded its first grants in the mid-1980s. Two grants of \$1,000 each were given – one to Life Crisis Center to employ a child sexual assault counselor, and the other to Coastal Hospice to provide start-up costs for a bereavement support group.

**Founding Board of Directors of the Community Foundation of the Eastern Shore**

These are the original members of the Board of Directors of the Community Foundation.

Oscar L. Carey  
Herbert H. Fincher  
W. Howard Hayman  
Richard A. Henson  
W. Thomas Hershey  
John E. Hess, Sr.  
Marianna R. Holloway  
Virginia H. Korff  
Frank H. Morris  
Richard S. Wooten



Carey



Fincher



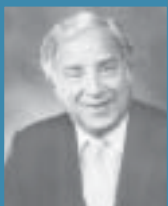
Hayman



Henson



Hershey



Hess



Holloway



Korff



Morris



Wooten

**1985:** Richard Henson publicly announces \$1 million gift; gives Foundation first \$200,000 installment.

**First Endowment Funds established:** The Rotary Educational Fund and the Professor A.L. Fleming Memorial Scholarship Fund are transferred to the Foundation.

**1985:** First grants are awarded to Life Crisis Center and Coastal Hospice. The organizations receive \$1,000 each.

It was a bold move for such a young organization and demonstrated the confidence that local leadership had in the Foundation's prospects. The conventional wisdom of the time concerning community foundations was that a foundation needed at least \$5 million in permanent endowed funds to reach "critical mass" and become self-supporting. Fortunately for the Foundation, the Charles Stewart Mott Foundation also saw their potential and awarded the Foundation a "challenge grant" of \$15,000 that year, to support the Foundation's operational expenses while it strove toward the \$5 million mark. The grant had to be matched dollar for dollar – a task completed within six months. The Mott Foundation would go on, in later years, to award two more challenge grants to the Foundation – an unprecedented feat at the time. The Mott Foundation's support, and the community's response, while providing important immediate funds for operations, also demonstrated the confidence held by both groups in the young foundation and its promise.



Frank Morris and Tom Hershey.

Thanks to the Mott grant and those who "shared the vision" and recognized the Foundation's immediate needs, the Foundation purchased its first piece of non-donated equipment in 1987 – a computer system. "It had a 10 MB hard drive," Linda Hutchinson recalls. "More than we ever thought we could possibly fill!"

Mark Bailey, the Foundation's part-time executive director, remembers his days of striving for excellence on a shoe-string budget. "I remember spending about a day a month just pulling the financial information together for the monthly board meetings. With the assistance of the accountant, we came up with a method for unitizing the earnings to their respective funds. This was the early days of Lotus 1-2-3. The process gave me early gray hair!"

The community was extremely generous with offers of in-kind support, from Diane Darnell's oversight of the books, to Tom Trice and Trice, Geary & Myers, LLC, CPAs completing the audits. Victor H. Laws of Laws, III, of Laws & Smith, PA, provided legal counsel for many years.

The board of directors expanded in early 1987 to include Chip Dashiell, Dick Hazel, Tom McCarthy, Sam Seidel and Dave Stein. Frank Morris succeeded Carey as Chairman of the Board. "Frank's vibrant interest in everything, and everyone, was a source of inspiration to us all," remembers Lucy Mohler. "Only a man of Frank's vitality and understanding could succeed in conveying so vividly his own passion for stewardship the cornerstone of any flourishing foundation. Although I admired him for his intellect, I treasured him for his humanity."

The Foundation continued to grow throughout 1987, as donors created 11 new funds during that year, bringing the total number of funds to 26, and, with other contributions, nearly doubling the Foundation's asset base during the year.

In response to the growth, the board hired investment managers Beese, Fulmer & Pincoe, beginning a relationship which continues today. In keeping with Goff's idea of separating funds management and grant distribution, the arrangement allows for professional, balanced and specialized management of funds for growth and preservation of capital in addition to providing economies of scale. It also allowed the Foundation to focus on community grantmaking and service. (Mason Securities, Inc. was brought on in 1999.)

At that point, Linda Hutchinson recalls, "We realized the foundation could and should serve more than just the Salisbury area. We decided to change the name to the Community Foundation of the Eastern Shore, a name which reflected the commitment to include the entire Lower Eastern Shore in our service area."

Mark Bailey had left the Foundation by then, and Linda Hutchinson had been promoted to Associate Director. A nationwide search was conducted in 1988 to hire a full-time executive director. As luck would have it, the search ended in the Foundation's own backyard when Lucy Mohler, a long-time Salisbury resident, took a lunchtime walk down Main Street and heard about the position.

### 1987: The Foundation Board Expands

Chip Dashiell, Richard Hazel, Tom McCarthy, Sam Seidel and David Stein expanded the Foundation Board to 15. Later, the Board would expand again, to its current 25 members.



Dashiell



Hazel



McCarthy



Seidel



Stein

**1986:** Community Foundation receives \$15,000 Challenge Grant from the Charles Stewart Mott Foundation.

**1987:** Foundation's formal name is changed to the Community Foundation of the Eastern Shore.

**1988:** Lucy Mohler becomes the Community Foundation's first full-time executive director.

Mohler, with a professional background in investments and great talent for Foundation administration and leadership, was hired. During her tenure, assets grew by more than \$1 million each year to reach just shy of \$6 million in 1993. Just as importantly, under Mohler’s leadership, the groundwork was laid for Foundation policies for grantmaking, administration, fundraising and community outreach.

Linda Hutchinson had left the Foundation in January of 1988 to pursue other opportunities, and Bonny Sunderland, a banking professional, joined Mohler as staff in 1990.

**Moving Forward**

In 1991, the Foundation reached an important milestone when annual grants began exceeding a half-million dollars. In fact, in that particular year, grants exceeded \$1.3 million, although the Foundation’s asset base was only \$4.2 million at the time.

Tom Hershey was Chairman of the Board at the time. “Tom’s enthusiasm was inspiring and his devotion to philanthropy remarkable. He led the Foundation for two years. During his chairmanship, assets grew by a million dollars, allowing the Foundation’s resources to reach ‘critical mass’ – the point at which a foundation’s assets begin to grow exponentially,” Mohler remembers.

The Foundation also began reaching out to financial professionals in the area in 1991. “In keeping with our goal of educating the community on the benefits of the Foundation, we brought in several estate planners to speak to the community,” Sunderland recalls. “Conrad Teitell came in November 1991, and Tom Rogerson in September 1995.”

Herb Fincher succeeded Hershey as Chairman of the Board. One of the “founding fathers” of the Foundation, Fincher “was the kind of man who never saw a challenge — only opportunity,” remembered W. Paul Martin, then mayor of Salisbury. “His combination of an untiring spirit, intelligence, compassion for his fellow man, and genuine love for his community was rare, and our community is all the better for his having been here.”

In the summer of 1993, Mohler moved on, and another nationwide search was conducted. By then, Mike Abercrombie was the Chairman of the Board, and he and the Board of Directors were determined to find just the right person. Although community foundations had been around since 1914, at the time, only about 70 existed nationwide, and professionals with experience were at a premium.

The search process continued for the better part of a year. Sunderland held down the office – still located on the fifth floor of One Plaza East back then – and Chairman Abercrombie assigned himself daily visits to the office to keep things up and running. “After Lucy left, I worked by myself in the office for 10 months while they were looking for a new executive director. I could not have done this without the help of Mike Abercrombie, the board, and the committee members,” Sunderland says.

While the Foundation had grown tremendously, everyone continued to pitch in with volunteer support to minimize expenses. “I used to take our mailers home and my husband and I would stuff them and sort them by zip code,” Sunderland remembers.

Finally, Emilie W. Robinson, a Connecticut community foundation professional, was selected to fill the position in October of 1993.

“On a Friday in August of 1993, I touched down in Salisbury, Maryland, for my recruitment interview,” Emilie Robinson remembers. “What I discovered was a jewel of a community foundation. During that hot August weekend, I met every single board member as well as some community leaders and the retiring executive director. Each seemed more eager than the last to talk about the Foundation, its great qualities, and its challenges. Never before had I witnessed such a pervasive passion for an organization’s excellence.

Robinson’s previous experience in the community foundation field brought the Foundation to yet another new level in service, programming and operations. With Robinson at the helm, and Sunderland working on the Foundation’s financial affairs, administrative assistant Linda D. Smith was brought on board to manage the busy office.

“As our funds grew, so did the recordkeeping,” Sunderland recalls. “We had two computer software upgrades during my time with the Foundation. Tracstar was the first and FIMS was the second upgrade. These databases were integrated into our office with the help of Joe Ollinger’s company, Data Services. Jim Middleton and Larry Jones were a big help.

“Both computer upgrades helped us work faster and more efficiently. These



Mohler



Robinson

**Executive Leadership**

The Community Foundation has been fortunate to rely on the experience, skills and dedication of the following individuals, who served as executive directors and (since 2001) president of the Foundation.

- Robert W. Cook - 1984
- Mark A. Bailey - 1984-86
- Lucy A. Mohler - 1988-93
- Emilie W. Robinson - 1993-2001
- David N. Michaud - 2001-2004

computer systems had the potential to computerize the Interest Allocation Spread Sheet initially developed for the Foundation by Oscar Carey almost 10 years before. In addition, the software helped the Foundation meet the FASB (Federal Accounting Standards Board) requirements.”

### The Foundation Comes of Age

During Robinson’s tenure, a number of initiatives and programs were begun, all of which helped expand the Foundation’s service to the community and the community’s awareness and understanding of the Foundation’s potential.

Reaching out to financial professionals became a priority. Robinson devised the Professional Partners for Community Philanthropy, the first such organization of professional advisors on the Lower Shore, which provided educational and networking opportunities for financial professionals.

Joining with 34 other nonprofits to elevate awareness of planned giving, the Foundation was a sponsoring partner of “Leave A Legacy.” In addition, the Foundation signed on to the Standards of Excellence program, designed to hold the Community Foundation to the highest professional standards, and encouraged other non-profits to participate.

“Our biggest challenge in 1993 was the same as it was for all small community foundations at that time,” Robinson says. “We were this area’s ‘best kept secret.’ Many individuals and organizations did not know about us, and many of those who did, while they were pretty sure we were a good thing, did not understand what we actually did or how they could be involved with us.”

Still, the community was attracted to the Foundation and support flourished. “The first annual meeting I attended was held at the Sheraton Inn in Salisbury,” Sunderland remembers. “Once the attendance grew, we had to look for a larger location. In 1993, we moved the meeting to Salisbury University.”

Robinson also hit the road to increase awareness of the Foundation and its mission, speaking to civic groups, nonprofits, the local media and community leaders. A monthly series of “lunch and learns” spanned a three-year time frame and invited hundreds of residents to become familiar with the Foundation. In 1994, during the Foundation’s tenth anniversary celebration, Robinson contracted the Foundation’s first public relations consultant, Susan Steckman. Steckman and Cleary Design developed the Foundation’s now-familiar column logo and the first “Pillar” newsletter, and Steckman helped the Foundation publicize its activities. A year later, after the birth of her child, Steckman resigned, and the Foundation contracted Susanne (Hammond) Zilberfarb, who still serves the Foundation, as her replacement.

As part of the tenth anniversary celebration, nationally recognized philanthropic speaker, Bill Somerville, sponsored by the Hewlett Packard Foundation, led a series of education seminars for area professional advisors, potential donors, and grantmakers.

The Board of Directors remained the guiding force and the mainstay of the Foundation during its first decade of marked growth and development. The Board was expanded yet again in 1994 to include more representation from Somerset and Worcester counties. The men and women who joined the Board did so with the same distinction as their predecessors, giving of their time, their talents and their treasure with uncommon constancy. Financial goals were set, met, and often exceeded. The third Mott Challenge grant, to benefit the Foundation’s administrative endowment and operating expenses, required \$80,000 to be raised. The community gave \$125,000, and the Foundation used the opportunity to reduce administrative fees charged against funds by eight percent, allowing more income to be available for grants. Assets grew from \$5.71 million in 1993 to top the \$10 million mark just three years later, in 1996.

Also in 1996, the Foundation benefited again from its early benefactor, Oscar Carey, who transferred \$1.2 million in assets from the private George and Helen Chandler Foundation to the Community Foundation. The Chandlers, who were Carey’s parents, would be memorialized with three new funds named in their memory: The George and Helen Chandler Fund for Community Needs; The George and Helen Chandler Administrative Endowment Fund; and the George and Helen Chandler Designated Fund. The gift was a record for the Community Foundation, and boosted the Foundation’s total endowment for community needs alone by 60 percent.

“Folding the foundation into funds at the Community Foundation gives us reassurance that these assets will be used to support the community for all time,” Oscar Carey said at the time.

In 1997, with assets of \$15 million, the Foundation started its Legacy Society, a way of recognizing individuals who had made plans for a deferred gift to the Foundation through a bequest, life insurance or other means. Jim Almand, the Foundation’s Chairman of the Board at the time, and his wife Anne were among the first to join.

Corresponding to the Foundation’s greatly increased asset base and scope of work, the Foundation staff also expanded. After Sunderland, by then the Foundation’s administrative officer, announced her retirement, Elizabeth “B.J.”



*James Almand, left, became Chairman of the Board after Mike Abercrombie.*

**1992:** The first Frank H. Morris Humanitarian Award for exemplary community service is awarded to Anne W. Taylor.

**1993:** Community donors help Foundation complete an unprecedented third Mott Challenge grant by raising \$125,000, exceeding the campaign goal by \$45,000.

**1993:** Emilie W. Robinson becomes the Foundation’s executive director.

*“Fifteen years ago, if you would have said that we’d have assets of almost \$23 million, anyone connected with the Foundation would have been amazed ...”*

— **Oscar Carey**, Founding Chairman, *on the occasion of the Foundation’s 15th anniversary.*  
*Foundation assets reached \$42 million just five years later.*

Summers was brought on to provide office help. Soon after, David Michaud joined the staff as assistant director, and Linda J. Franklin became bookkeeper/accountant.

The Foundation continued to reach out to the community, forging partnerships to promote charitable actions. “Basically, wherever we saw an opportunity for the Community Foundation to be effective by encouraging collaboration, or by partnering with people, agencies, or other grantmakers to make the community better, we acted,” Robinson says.

The Service As A Strategy grant initiative started in 1998, after 11 Salisbury community leaders attended the President’s Summit on Volunteerism in Philadelphia. Inspired, they returned home and coalesced into “Salisbury’s Promise – Alliance for Youth.” With the help of the Community Foundation, \$32,500 in match grants were raised for the initiative, a sum increased by \$13,000 by Salisbury’s Promise through a grant from the Points of Light Foundation. With these funds, the partnership supported programs that encouraged Salisbury youth to become engaged in service, volunteering and cooperation.

Coincidentally, about the same time, a youth with a strong service ethic emerged in the Foundation’s own office: Summer intern Sheila Chandrasekhara. Though a high school senior, Chandrasekhara saw the potential of the Foundation’s ability to improve the lives of youth. She started the Youth Foundation Fund in 1999 to generate awareness of youth needs and support projects that promote youth betterment. The idea caught on. After a service at her temple that summer, a young man tapped her on the shoulder and handed her a \$50 bill. A freshman at Parkside High, he had heard about the youth fund and wanted to give her his earnings from his summer job.

The Youth Foundation Fund now is guided by student representatives from each high school in Somerset, Wicomico and Worcester counties, who oversee fundraising and grantmaking.

On June 30, 1998, the Foundation closed out its 14th year with a total asset base of \$18.5 million. Earlier that year, the Board, recognizing an astonishing growth rate of 25 percent per year over the previous five years, adopted aggressive financial goals for the Foundation’s total asset base and, especially, its endowments for Community Needs grantmaking.

Community Needs endowments held at the Foundation are “discretionary” funds which the Foundation may use toward the most immediate or compelling concerns in the community, regardless of subject area. (The use of other types of funds held by the Foundation are “restricted” by donors or by subject area, providing special support for projects that represent that donor’s interest.)

Recognizing the need to support local schools, the Foundation launched the first Awards for Excellence in Education with discretionary funds in 1999. The response from local schools was so great, that the Foundation quickly expanded the program and redoubled efforts to raise discretionary funds. That fall, at 15 years of age, the Foundation held \$22.8 million in assets, although discretionary funds were only a small piece of that pie.

### **New Opportunities**

Fortunately, in December of 1999, in what will be remembered as a cornerstone event in the Foundation’s history, the Kresge Foundation of Troy, Michigan, chose the Community Foundation of the Eastern Shore as one of only six partners nationwide in its Kresge Challenge to Build Community Capital.

“When we learned of the Kresge Challenge grant program, with goals so similar to the ones we had chosen for ourselves, our board unanimously voted to apply,” Robinson remembers.

The Kresge Foundation, established by K-Mart founder Samuel Kresge, had, until then, a reputation for successful, yet exclusively, “bricks and mortar” campaigns. The Kresge Challenge to Build Community Capital was born of the Kresge Foundation’s desire to increase the strength of America’s nonprofit organizations by “building” endowments through community foundations. Their “construction method” was a match grant: Offering a community an equal match to the local funds raised, effectively multiplying each gift, and energizing the donor base in that community to become engaged beyond “giving” to “philanthropy.”

The Community Foundation of the Eastern Shore had the smallest service area of the six organizations to be chosen, and the rural nature of the Lower Eastern Shore initially made Kresge officials question whether an area with such a small population base could mount a locally unprecedented \$3 million dollar campaign. Had they known the people involved, they would never have doubted. Virginia Layfield



Layfield

was Chair of the Board, and worked side-by-side with the committee and Robinson on the Foundation's application.

Lower Shore leaders rose to the challenge. "My heart sang with pride that memorable day in October of 1999 when we showcased our amazing community to the Kresge representatives who had come so far to evaluate us. It was, by far, the most gratifying day of my eight-year tenure at the Foundation," Emilie Robinson recalls. "I knew our Foundation was strong in every way, and that our application was equally strong. I was intensely proud of our diligent and committed Board, and equally so of our competent and spirited staff, and the excellent nonprofits in our community. Hosting the the Kresge Committee gave us an opportunity to see our community from an outside perspective, and to bask in the glow of it. It was beautiful."

The Kresge Challenge was divided into two phases: increasing the Foundation's endowment for Community Needs; and building agency endowments held for specific nonprofits by the Foundation.

Given five years to complete both tasks, Lower Shore donors met and exceeded the requirements of the first phase in just a few months' time – by November of 2000, Chairman of the Board Marty Neat announced that more than \$1 million in endowments for Community Needs had been raised, and that the Kresge Foundation's \$1 million match for the Foundation's Community Needs grantmaking had been received.



*Board Chair Marty Neat and President Emilie Robinson accepted the Foundation's largest gift ever — \$4 million — from Frank and Mitzi Perdue.*

Meanwhile, local businessman and philanthropist Frank Perdue and his wife, Mitzi, announced they would give the Community Foundation the largest gift received to date by the Foundation: \$4 million.

The Perdues' \$4 million gift would be combined with the Kresge Foundation's \$2 million challenge to provide a total of \$6 million in matching funds for Phase Two. Nineteen local nonprofits were ultimately selected in January 2002 to raise the dollar for dollar match – upon meeting their individual fundraising goals, they triggered the same amount in Perdue-Kresge matching funds.

When complete in January of 2005, a total of \$12 million in new agency endowments will be held at the Community Foundation, and the goals set by the board almost assuredly achieved. To provide staff support for the Perdue-Kresge Challenge, and to develop the staggering amount of policy and procedures involved with executing the challenge, the Foundation brought in retired Army Brig. Gen. Mary C. Willis. Her contributions over the next two years laid the groundwork for the Foundation and the community nonprofits who would participate.

In May 2001, Emilie Robinson retired as President of the Community Foundation, and after an extensive search and interview process, the board elevated Assistant Director David Michaud to president. "David has been a great asset since we were lucky enough to find him in the fall of 1998," Robinson says. "He had worked diligently on many facets of the Foundation that made our Foundation and our Kresge application so strong. It was logical that, after an extensive national search, he was chosen to be the next president."

Michaud grew up on the Eastern Shore, in Salisbury, and relished the opportunity to apply his professional background in nonprofits and his personal goals to the Foundation.

Renovating the staff structure was among his first moves. With the addition of multiple grantmaking programs distributing around \$2 million per year, and more than 300 funds to manage, Michaud needed the staff to "specialize."

In July 2001, longtime employee B.J. Summers became the Foundation's first Donor Relations Officer. With her assistance, the Foundation decreased the processing time for donor advised fund grants, started "Donor Connections," a newsletter for donor advisers, and began hosting "donor briefings" — an exclusive opportunity for donors to have lunch with individuals involved with community issues and charitable organizations.

Michaud's leadership began during a time of great change as the Foundation experienced unprecedented asset growth, significantly greater unrestricted grantmaking, growing needs of individual donors, and the worst downturn in the stock market in more than 70 years.

In response to these changes and to deal with rising expectations, a major effort was started to retool and reexamine the Foundation's operations, policies and staffing, all necessary steps to take the organization to the next level of service and success.

With Linda Franklin's departure to head another local nonprofit, Gary Martin was brought on as director of finance and administration. Candice Finkbiner became administrative and financial assistant the year after Linda Smith's retirement. Finkbiner was succeeded by Patt Strausburg in 2003, shortly before the Foundation brought on William "Gee"



Michaud

**1998:** The Foundation helps launch "Leave A Legacy — Lower Eastern Shore" with 34 other local nonprofits.

**1999:** Foundation assets reach more than \$20 million.

**1999:** Community Foundation is selected by the Kresge Foundation for its Campaign to Raise Community Capital.

Williams as its first director of development and marketing.

Meanwhile, as the Foundation matured, funds reached milestones. In 2001, two noteworthy funds reached their tenth anniversaries: The Reading Forever Fund, established by Samuel W. and Marilyn Seidel to help provide the resources to keep local school libraries full of new and interesting reading material; and the Hazel Minority Scholarship Fund, established by Patricia and Richard Hazel to benefit local minority scholars who intend to become educators on the Lower Eastern Shore.

By 2002, the Community Foundation had expanded its discretionary grant programs to four. Besides the Community Needs grant program, the following programs were established: The Community Initiative Grant Program; the Non-profit Technical Minigrants Program; the Excellence in Education Grants Program, and the Field of Interest Grants Program. During this same period, the Foundation awarded more than \$90,000 in more than 60 scholarships. To staff these programs, the Foundation employed its first Program Officer, David Baker. (Baker retired from the post in 2003, after providing invaluable assistance in policymaking and program development. His successor, Erica Wagenhals, joined the staff shortly before his departure.) The Foundation's longtime legal counsel, Vic Laws, III, was succeeded by Charles R. "Chip" Dashiell, Jr., a partner at Hearne & Bailey, P.A., during 2002.

Working from a joint Community Needs Assessment report with the local United Way, the Foundation focused on the area's top needs for its first-ever Community Initiative. As a result, in June of 2002, the Foundation gave out its largest discretionary grant as part of the Community Initiative program: a \$50,000 grant to Wor-Wic Community College to equip a nursing lab, which helped increase the number of students enrolled in the LPN and RN programs by one-third.

The benefactors of the ongoing Perdue-Kresge Challenge, Frank and Mitzi Perdue, and Kresge Foundation President John Marshall, were on hand at the Foundation's annual meeting in November 2002 to offer encouraging words to the Perdue-Kresge Partners and the community. They also presented checks for the first match in the campaign to the Magi Fund.

Other changes instituted during this period include increasing the Foundation's commitment to professional advisors by being a catalyst for the creation in 2002 of the Delmarva Planned Giving Council (DPGC). This effort built on the Foundation's previous work to educate professional advisors through the Professional Partners for Community Philanthropy and the Leave A Legacy Program, which increases awareness about planned giving in the community.

Through the DPGC, professionals throughout the Delmarva Peninsula now receive regular educational opportunities on charitable giving, greater interaction with other professionals and charities, and greater public outreach through the council's Leave A Legacy Delmarva campaigns.

In the area of administration, the Foundation fully upgraded and integrated all financial operations to create more accountability for both internal auditing and to provide more frequent and improved fund statements for donors. The Foundation's web site was expanded and upgraded. New financial and investment systems were put in place that proved to be instrumental in allowing the organization to successfully manage the downturn in the financial markets.

The Foundation's sound fund management during the weak market not only allowed for the mission of grantmaking to continue, but was recognized by the Council on Foundations as establishing a consistent record of some of the highest investment returns in the field.

In its first 20 years, the Foundation has grown from an idea nurtured by a handful of visionary leading citizens into a permanent community institution with \$43 million in assets. Over the years, the Foundation has given back more than \$17 million through almost 9,000 grants to nonprofit organizations which help improve the lives of the citizens of Maryland's Lower Eastern Shore.

Today, the Community Foundation of the Eastern Shore is recognized as a successful and respected midsize community foundation with the same full range of services offered by long-established foundations in large cities or in other geographic regions of the nation.

As the 20th Anniversary is celebrated, the financial performance and asset growth of investments and new gifts has put the Foundation in its rightful position of leadership, focusing on a future full of opportunity and promise that comes from maturing into the region's leading philanthropic institution on the Lower Eastern Shore of Maryland.

*Celebrating 20 Years:*  
Community Foundation of the Eastern Shore

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**This historical perspective was recorded by:**  
 Robert Cook, Founding Member and First Executive Director  
 Mark A. Bailey, Executive Director, 1984-86  
 Linda W. Hutchinson, Administrative Assistant, 1986-88  
 Bonny Sunderland, Administrative Officer, 1990-99  
 Lucy Mohler, Executive Director, 1988-93  
 Emilie W. Robinson, Executive Director and President, 1993-2001  
*Edited by Susanne Zilberfarb, Consultant*

*“There were several Board members who were very special to me. Frank Morris and his wife Sue, Tom Hershey, Jim Almand, Virginia Layfield and Oscar Carey. ... The Foundation was like a family.”*

— **Bonny Sunderland**, *Former Administrative Officer.*



**2002:** Foundation awards \$50,000 to Wor-Wic Community College to expand its nursing program in the Foundation’s first Community Initiative.

**2003:** The Foundation becomes the first community foundation to receive the Seal Of Excellence from the Maryland Association of Nonprofit Organizations.

**2004:** As the Foundation celebrates its 20th anniversary, total assets reach more than \$42 million.



*Community  
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*The Community Foundation of the Eastern Shore  
is a proud recipient of the Seal of Excellence from the Maryland Association  
of Nonprofit Organizations. We proudly display this logo to demonstrate  
our commitment to upholding the highest standards of ethics and  
accountability in the nonprofit sector.*