

# Inspiration

*...where philanthropy begins*

## Keeping the Dream Alive

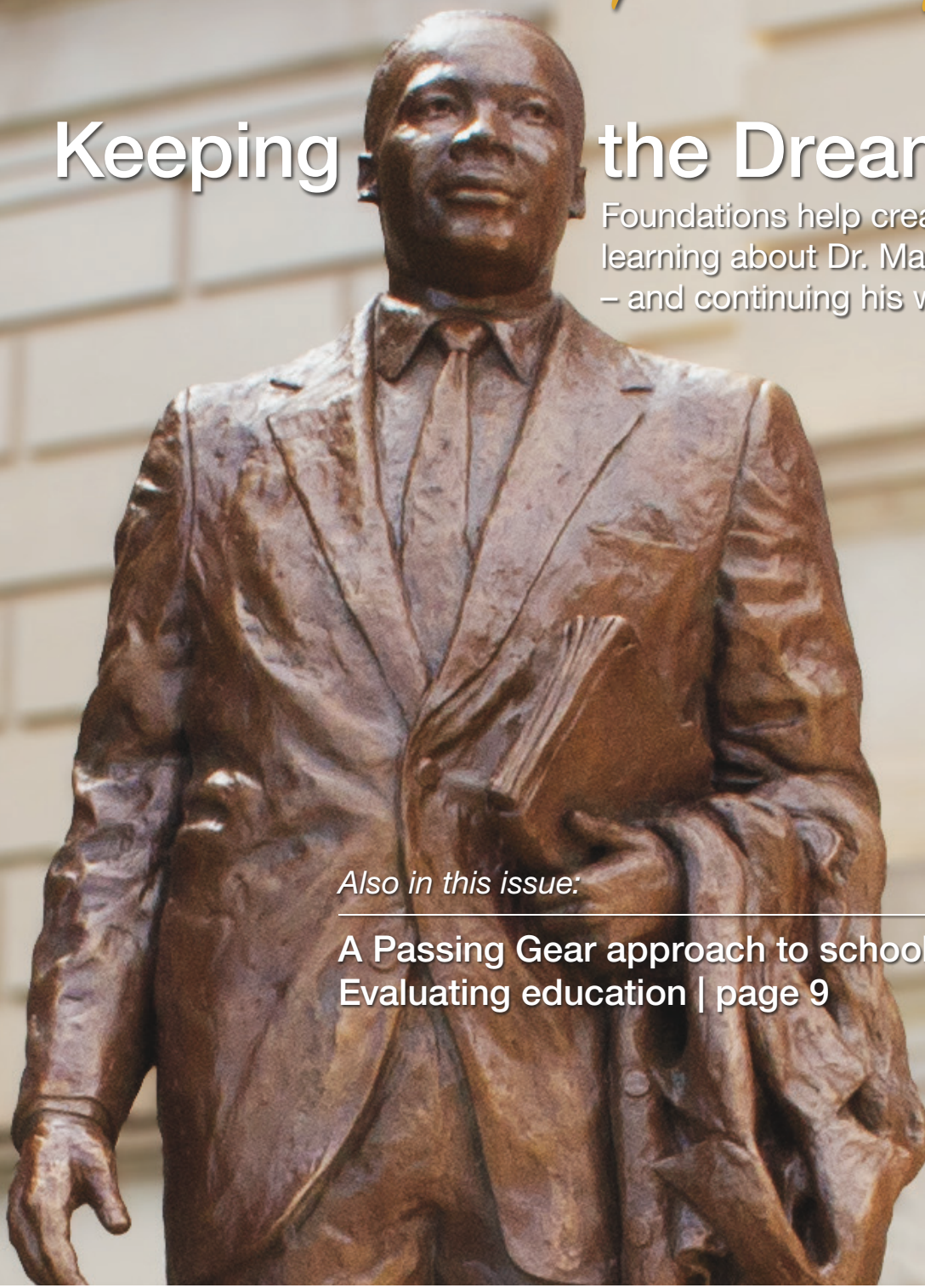
Foundations help create spaces for learning about Dr. Martin Luther King, Jr. – and continuing his work.

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**Mission:** The Southeastern Council of Foundations serves, connects, strengthens & champions philanthropy and the philanthropic infrastructure in the South.

**Statement of Intent:** The Southeastern Council of Foundations strives to support Members and grantmakers with access to education, resources and networking by serving as a convener and facilitator, offering a diverse range of voices and perspectives. We do not endorse colleague organization views, but rather aim to provide access to a broad range of information and resources to increase grantmaking impact and develop philanthropic leaders throughout the region.

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Cover photo: Statue of Dr. Martin Luther King, Jr.,  
outside the Georgia Capitol Building (Photo by Kevin Brittelle).

# ..... letters to philanthropy .....

**Dear Friends,**

*"Human progress is neither automatic nor inevitable... Every step toward the goal of justice requires sacrifice, suffering, and struggle; the tireless exertions and passionate concern of dedicated individuals."*

Dr. Martin Luther King, Jr.

This month, our country – and the Southeast especially – has commemorated the life of Dr. Martin Luther King, Jr., who was assassinated in Memphis 50 years ago. The occasion has inspired me to reflect on two speeches that serve as bookends for that awful day in our history. Both are beautiful on their own, but also, to modern eyes, take on the weight of horrible events that followed them.



The first is Dr. King's "I've been to the mountaintop" speech, which was delivered on April 3, 1968, at Bishop Charles Mason Temple in Memphis. After rousing the crowd, he spoke of a prior attempt on his life and growing concerns over his personal safety. He then closed with these words, which are now impossible to read without a sense of foreboding:

*"I don't know what will happen now; we've got some difficult days ahead. But it really doesn't matter with me now, because I've been to the mountaintop... I've seen the promised land. I may not get there with you. But I want you to know tonight that we, as a people, will get to the promised land... I'm not worried about anything; I'm not fearing any man. Mine eyes have seen the glory of the coming of the Lord."* Incredibly, before he was killed, Dr. King told friends he had made peace with his death. He

spoke of the work that would continue after he was gone.

The second speech was delivered by Senator Robert F. Kennedy, who climbed onto the back of a flatbed truck in Indianapolis only hours after Dr. King's death. Relying on hand-written notes, he spoke from the heart to a mostly African-American crowd in Indianapolis.

*"In this difficult day, in this difficult time for the United States, it's perhaps well to ask what kind of a nation we are and what direction we want to move in. For those of you who are black... you can be filled with bitterness, and with hatred, and a desire for revenge.... We can move in that direction as a country, in greater polarization – black people amongst blacks, and white amongst whites, filled with hatred toward one another. Or we can make an effort, as Martin Luther King did, to understand, and to comprehend, and replace that violence, that stain of bloodshed that has spread across our land, with an effort to understand, compassion, and love."*

In April 1968, death had already been a strong presence in the lives of both men. They recognized that any person's life, especially one's own, could end abruptly – but this was not a reason to abandon ideas and dreams.

Endowed philanthropy, by definition, embraces the idea that a person's legacy can outlast their life. But if we truly want to make a transformative, lasting impact, I believe a deeper understanding of King's and Kennedy's words is required.

In 1968, Martin Luther King was a Nobel laureate and the clear leader of a movement that was in the midst of transforming the nation. Robert F. Kennedy was running for president as the de facto leader of the country's most prominent political family. Both possessed a tremendous sense of self. Yet when the moment demanded it, both – perhaps due to their strong sense of mortality – spoke not of their own importance, but of movements, collective action and our shared obligations to one another.

*Just as in 1968, we are in a time of polarization.  
How will we, as a people, get to the promised land?  
How will we improve the quality of our lives?*

*Janine Lee, President & CEO*

Toward the close of the speech, which lasted less than five minutes, he quoted the ancient Greek playwright Aeschylus, *"Even in our sleep, pain which cannot forget falls drop by drop upon the heart until, in our own despair, against our will, comes wisdom through the awful grace of God."*

Just like Dr. King, Kennedy noted the role that previous violence – his brother's assassination – had played in his life. And like Dr. King, he went on to acknowledge that despite so much tragedy, he remained hopeful.

*"It is not the end of violence; it is not the end of lawlessness; and it's not the end of disorder. But the vast majority of white people and the vast majority of black people in this country want to live together, want to improve the quality of our life, and want justice for all human beings that abide in our land."*

Kennedy, of course, would fall victim to another assassin's bullet just two months later.

Just as in 1968, we are in a time of polarization. How will we, as a people, get to the promised land? How will we improve the quality of our lives?

I don't have the answer to those questions. Dr. King and Robert F. Kennedy didn't, either. But they knew the answers would come from people putting aside differences to work together, motivated by humility and compassion.

At its best, I believe philanthropy can contribute toward making this happen – and I believe if we bring our best selves, strong leadership, voice and conviction to invest in changing lives and communities, philanthropy can be a transformative partner to make the dream a reality.

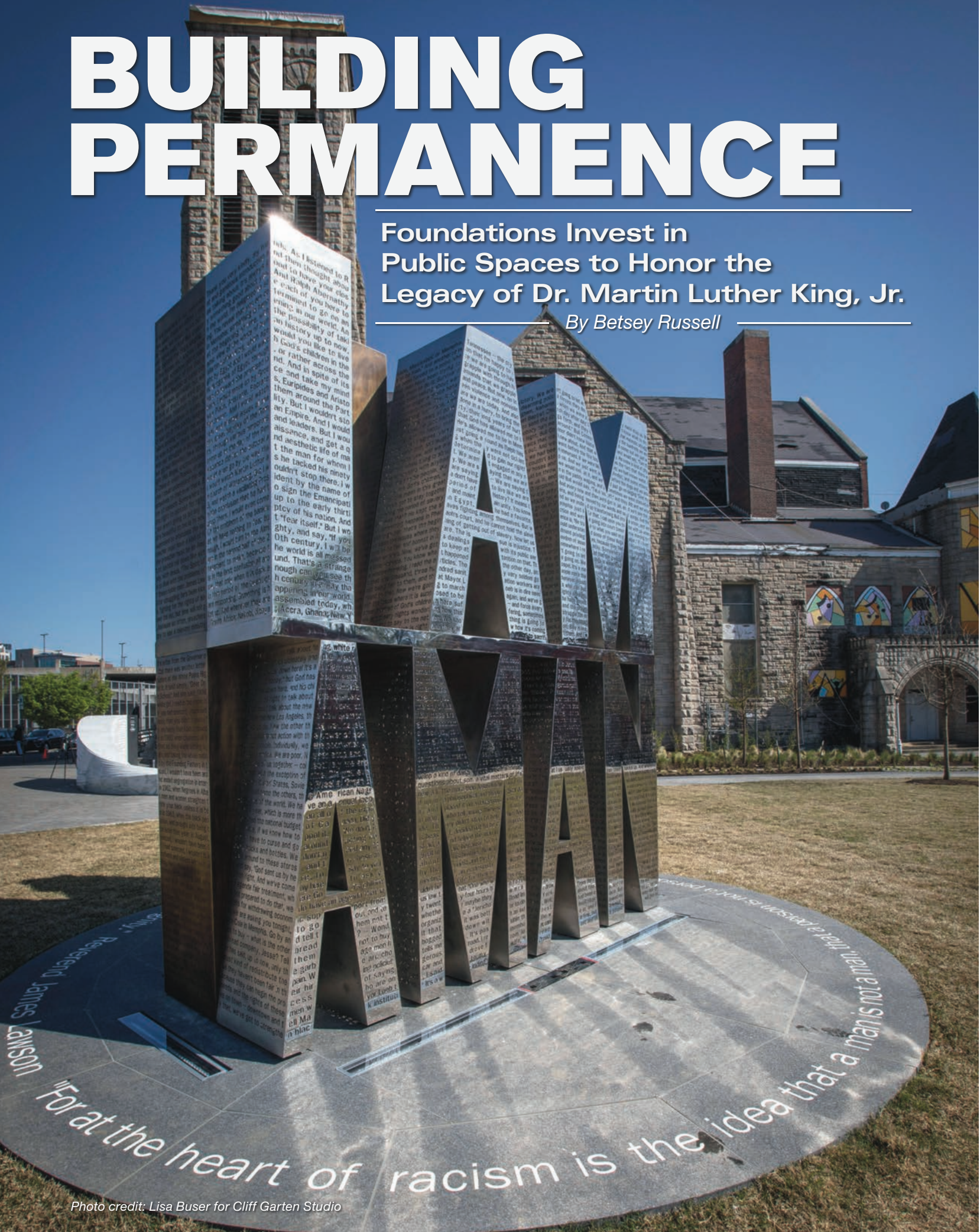
Warmly,

A handwritten signature in dark ink, appearing to read "Janine".

# BUILDING PERMANENCE

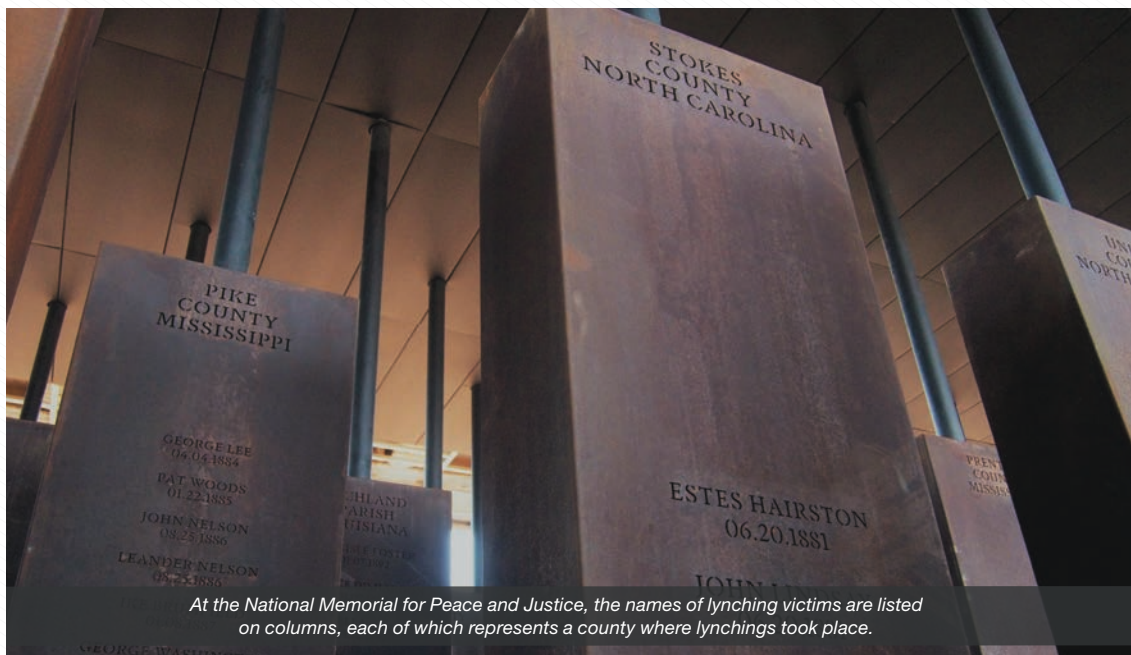
Foundations Invest in Public Spaces to Honor the Legacy of Dr. Martin Luther King, Jr.

By Betsey Russell



Fifty years ago, on April 4, 1968, the life of Dr. Martin Luther King, Jr. was cut short on the balcony of the Lorraine Motel in Memphis. But the legacy of Dr. King's work has continued to live on throughout the region, and philanthropy has played a role in sustaining and growing that legacy — not only through grantmaking and programmatic activity, but in creating physical spaces where individuals and groups can gather to learn about and work together in the ongoing struggle for racial equity and equality in the United States.

"We all know that bricks and mortar alone can't sustain Dr. King's legacy, and we attempt to do so on a daily basis through our words and actions, and our interactions with the community," says Robert Fockler, president of the Community Foundation of Greater Memphis. "But it's also important to create visual, permanent structures that provide a constant reminder of who Dr. King was and what he stood for — not just here, but throughout the South."



*At the National Memorial for Peace and Justice, the names of lynching victims are listed on columns, each of which represents a county where lynchings took place.*

## "The Soul of Philanthropy"

In Atlanta, the place of Dr. King's birth, the Community Foundation for Greater Atlanta (CFGa) helped elevate the contributions of dozens of philanthropists of color by supporting an installation of "The Soul of Philanthropy," a traveling exhibit showcasing the contributions of black philanthropists in American society. The Soul of Philanthropy exhibit was initially created in 2015 by author Valaida Fullwood and photographer Charles W. Thomas, Jr., who produced the award-winning book, *Giving Back: A Tribute to Generations of African American Philanthropists*. Since then the multi-media exhibit, which includes dozens of vignettes, still images, and interactive stations, has toured the country. SECF was a key sponsor of The Soul of Philanthropy, with president and CEO Janine Lee serving on the project's steering committee.

"Being the birthplace of Dr. King, we always want to support and promote efforts like this exhibit," says Lesley Grady, CFGa's senior vice president. "We also had the opportunity to localize it, selecting from hundreds of images to find those most relevant to Atlanta and identifying several local givers to highlight in the overall story."

The Soul of Philanthropy exhibit in Atlanta also offered a robust set of programming, including an examination of how hip-hop culture gives back to community, the role of faith in philanthropy, social entrepreneurship, and philanthropic grantmaking in issues that affect black communities. A session entitled, "The Money Behind the Movement," explored the role of African American philanthropy in elevating the Civil Rights movement and featured Grady as a panelist, along with a local business leader, a civil rights activist, an African American studies professor, and Elisabeth Omilami, daughter of Hosea Williams, a contemporary and confidant of Dr. King.

"The foundation was proud to bring that story to the forefront," says Grady. "It truly captured Dr. King's message that everyone can be great, because everyone can serve."

The Soul of Philanthropy was exhibited in Atlanta from November 1, 2017, to January 20, 2018.

## Soil from Selma

On March 4-5, 2018, thousands marked the annual celebration of three historic marches in Selma, Alabama in 1965, which included Dr. King's famous march from Selma to Montgomery. Thousands of people gather each year for a Jubilee celebration at the Edmund Pettus Bridge in Selma, but this year, the Black Belt Community Foundation (BBCF), the W.K. Kellogg Foundation and the Montgomery-based Equal Justice Initiative (EJI) dug a little deeper. Representatives

from BBCF and their Truth, Racial Healing & Transformation community partner (TRHT), The Selma Center for Nonviolence Truth and Reconciliation, and other community members gathered quietly in the early morning of Saturday, March 3rd at the site of a former Selma jail to gather soil in honor of two black men, Willy Webb and Daniel Edwards, who were lynched there in the late 1800s.

The soil samples will travel to Montgomery as part of an exhibit in the new Legacy Museum: From Enslavement to Mass Incarceration, that sits on the site of a former slave warehouse and explores the history of slavery and racial inequity. Soil collection is part of EJI's Community Remembrance Project, which helps local communities commemorate and recognize the traumatic era of lynching.

In addition to collecting soil samples, BBCF's TRHT community partner, The Selma Center for Nonviolence Truth and Reconciliation, was



*Photo credit: Isaac Singleton*

*I Am A Man Plaza, which commemorates the 1968 sanitation worker strike that brought Martin Luther King to the city, was formally unveiled on April 5, with several of the sanitation workers from that strike in attendance.*



centrally involved with EJI's historic marker installation and unveiling at the foot of the Edmund Pettus Bridge to commemorate 19 lynchings in Selma and Dallas County in the 19th and 20th centuries. The Community Foundation also helped produce a symposium on racial violence and an exploration of the legal, cultural, economic and political "lynchings" that have been part of African American history in Alabama.

"There were a lot of healing circles that took place in our community as a part of this year's Jubilee," says Black Belt Community Foundation President Felecia Lucky. "The Kellogg Foundation helped to facilitate those as part of its racial healing work. It was a chance for folks to come together and resurrect the stories of those who have gone before, open ourselves to truth telling and bring their voices to life."



The Legacy Museum in Montgomery sits beside another new structure: the National Memorial for Peace and Justice, created to honor more than 4,400 African American men, women and children who were terrorized and killed by white mobs between 1877 and 1950. Within the Memorial, 800 columns are suspended, representing 800 counties where lynchings took place. They are inscribed with more than 4,000 names of victims. Just outside the Memorial structure, identical columns are placed in waiting, for each county to come claim them and install them as permanent memorials within their own boundaries. Eventually, these 800 monuments will be installed throughout the region.

Both the National Memorial and the Museum will open to the public on April 26, 2018.

## I Am A Man

No place marks the anniversary of Dr. King's death like Memphis.

"MLK50, as it's called around here, is a very big deal," Fockler said.

The National Civil Rights Museum has been the nexus for scores of MLK50 activities over the past year. Multiple foundations, including the Community Foundation of Greater Memphis, the Hyde Family Foundation and the Plough Foundation, have funded or sponsored the museum's work, including a special MLK50 website, a Justice Through Journalism Project, and a memorial fund created to support MLK50 activities in memory of former attorney and civil rights activist George Riley.

But Memphis foundations are also paying attention to another anniversary – that of the 1968 sanitation workers' strike that brought



*Foundations have supported multiple efforts honoring Dr. King on the 50th anniversary of his death, ranging from (top to bottom) marches retracing Dr. King's steps, the construction of Memphis' new I Am A Man Plaza, the Soul of Philanthropy exhibit on black philanthropists and the collection of soil from lynching sites that will serve as part of a museum exhibit.*

Dr. King to the city at that time. During that strike, some 1,300 men took to the streets to march in protest of the working conditions they suffered. At that time, workers spent days hauling open containers of waste to trucks, were paid little, and weren't provided with uniforms. Instead, they had to subject their own clothing to the daily soil and stench. Safety considerations were nonexistent, and when two workers tried to escape from the rain in the back of a truck, they were crushed to death, thus sparking the strike in which sanitation workers marched against a backdrop of armed guards. Each held a sign that said "I Am A Man." It was the night before that march that Dr. King was assassinated, after giving his famous "I have been to the mountaintop" speech.

This April, Memphis unveils a new art park dedicated to those striking workers. The "I Am A Man" Plaza features sculptures and greenspace commemorating the strike, as well as phrases from speeches and writings of Dr. King and other civil rights leaders.

The Community Foundation of Greater Memphis has supported a city fund to promote various events marking the anniversary, the installation of "I Am A Man" Plaza, and the installation of a nearby Dr. Martin Luther King, Jr. Reflection Site in downtown Memphis. In addition, the Foundation has seeded a video project, *Striking Voices*, related to the anniversary and created by local journalist and author Emily Yellin.

"The strike and the assassination were the most transformative events in Memphis

history," says Fockler. "As a community foundation, our responsibility is to be the loud voice about this. We're about telling the stories that give voice to the needs and the possibilities of our community, so we funded history and video projects. Our intent was to document what really happened, forever.

"The video project was really interesting because the high-profile characters of the strike were the mayor and the city on one side, and the union and ministers on the other," Fockler adds. "But no one ever really told the story of the sanitation workers themselves. We thought it particularly important to tell the story of the men who really triggered the whole thing, including the two who died on the truck."

Commemorating the sanitation workers strike also was important to the Plough Foundation, whose founder, Abe Plough, was a quiet yet committed "anonymous" activist. The Plough Foundation provided nearly \$1 million for the "I Am A Man" Plaza. Funding this permanent site aligned with the Plough Foundation's focus on long-lasting projects, but also pulled at a personal tie to the city's history.

"During the strike, Mr. Plough tried to get the mayor to resolve it and even offered funds to pay for the increase in salary," says Plough Foundation President Rick Massen. "His activity will be commemorated at the site."

The Community Foundation also can trace a deep personal connection to this point in Memphis history.

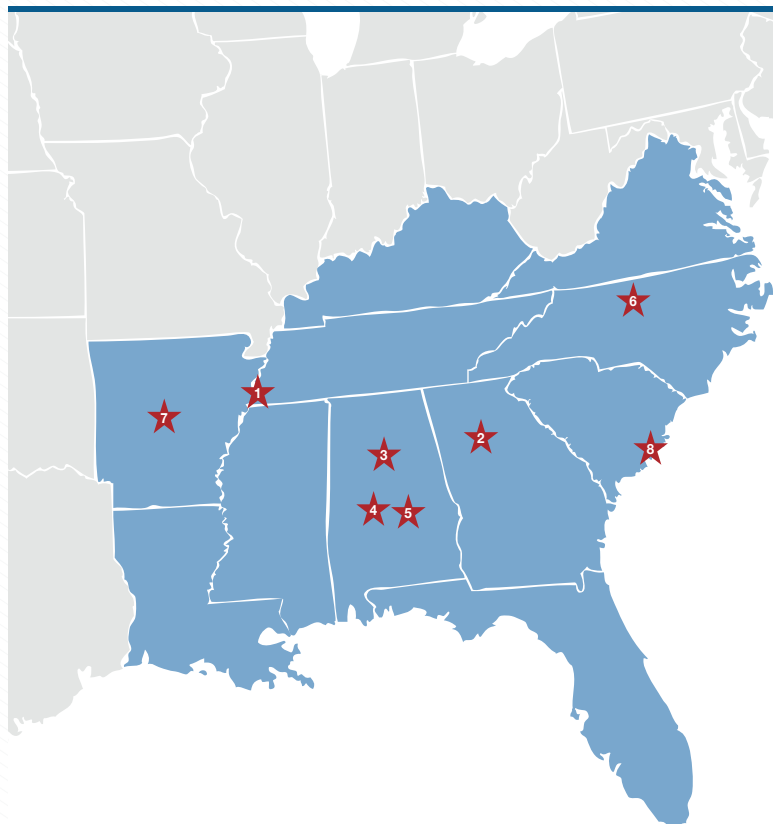
"Two major civic institutions are a direct result of the strike and the assassination," says Fockler. "Two ministers built a broad interfaith association to support the strikers, which afterward became Metropolitan Interfaith Association – one of the most transformative social service agencies in Memphis. The other was the Community Foundation of Greater Memphis. My predecessor, Gid Smith, a former Methodist minister, led both of these organizations."

## Moving Beyond Bricks and Mortar

As Dr. King said, "Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice which make philanthropy necessary."

While foundations are proudly funding physical reminders that elevate the ideals of equity and justice, they know that they cannot stop there.

"We have to be active, and I think that is why we are asking communities of influence — our faith community, and our scholars — to provoke people in ways that will make them question some of their thinking," said Terri Freeman, president of the National Civil Rights Museum and a member of the community foundation's board. "We really need to get our citizenry to see that their engagement in this overall civic process is crucial. You hear people say, 'Oh, it doesn't really matter what I do.' Well, it does matter."



## Civil Rights Road Trip

Foundations have supported a growing number of museums and centers dedicated to civil rights and justice throughout the region. *The following are just a few examples:*

1. The National Civil Rights Museum in Memphis is located at the historic Lorraine Motel and is the epicenter of the observance of the 50th anniversary of Dr. King's assassination.
2. Atlanta is home to the Martin Luther King, Jr. National Historic Site (which includes King's birthplace), the Martin Luther King, Jr. Center for Nonviolent Social Change (where King is buried), and the Center for Civil and Human Rights.
3. Birmingham's Civil Rights Institute is the nation's largest civil rights museum.
4. Visitors to Selma can visit the National Voting Rights Museum and Institute and follow in the steps of Dr. King across the Edmund Pettus Bridge.
5. In addition to the new Legacy Museum: From Enslavement to Mass Incarceration and the National Memorial for Peace and Justice (both opening April 26, 2018), Montgomery is also home to the Rosa Parks Museum and the Civil Rights Memorial.
6. The International Civil Rights Center & Museum in Greensboro, NC, includes the original Woolworth lunch counter where African American students' sit-ins in 1960 helped launch the civil rights movement.
7. Little Rock Central High School, which made history when it became integrated, is now a National Historic Site.
8. Charleston is currently planning and raising funds to open the International African American Museum on the former site of Gadsden's Warf, where the majority of African slaves landed in the South.



# FULFILLING THE PASSING GEAR PROMISE

## Farm to (Cafeteria) Table: How One Foundation Cooked Up a New Recipe for School Lunches

By Peter Panepento

Most of the 76,000 children who attend public schools in Greenville County, South Carolina, have never heard of the Piedmont Health Foundation.

After all, Piedmont – with its modest \$2.7 million endowment – is far from a household name, even in its hometown.

But every school day, the foundation is helping these students improve their health, habits, and academic performance through a school breakfast and lunch program that is being held up as a national model.

Today, the menu at each Greenville County school mirrors what you might find on the list of daily specials at your favorite farm-to-table restaurant: turkey pot roast, Alaskan pollock, buffalo blue chicken salad, salmon Caesar salad, and St. Louis-style BBQ ribs. The meat is farm-raised and locally sourced, the fruit and vegetables are fresh, and – in some cases – the greens and herbs are grown on site.

As a result, students are eating expertly prepared meals from all-natural ingredients – created within the constraints of a limited budget and government guidelines that would appear to limit what's possible at a school cafeteria.

"When I was in school, we would have things like chicken bites with warm raisins and yeast rolls, or Salisbury steak or hamburgers – things that, in my mind, are not exciting menu choices for a child," says George Champion, principal

of Greenville's Slater Marietta Elementary School. "But the menu options that we make available today are so much different and we are seeing big changes in the students, as a result."

### Breaking an Old Model

The story behind Greenville County's extraordinary school breakfast and lunch program started in 2007, when Piedmont Health Foundation Executive Director Katy Pugh Smith took part in the Southeastern Council of Foundations' 2007 Hull Fellows program.

During the fellowship, Smith learned of a concept called Passing Gear philanthropy from the 2007 State of the South report – a document that would change the way she and her board thought about the foundation's work.

After reading and discussing the report, the foundation decided to transform its grantmaking approach. Rather than granting money to fund programs, the foundation would instead dedicate its resources to making policy, systems and environmental changes – all with the goal of creating a more equitable community.

To do that, Piedmont began to study how it could have a positive, large-scale impact on the community's health – particularly among those who were economically disadvantaged.

Through its research, the foundation learned that more than 2 in 5 students in Greenville schools were either overweight or obese – and obesity rates increased the lower a child's family was on the economic scale.

Making matters worse, people who have obesity are at increased risk for many serious diseases and conditions, have a higher mortality rate, and are much more likely to have mental illnesses such as depression and anxiety, according to the Centers for Disease Control and Prevention.

By attacking obesity – particularly among children in its community – Piedmont had an opportunity to help improve public health across the board. And it determined that the most effective place to reduce obesity was through the school cafeteria.

"From an equity perspective, it was a priority for us that all school meals be healthy. The early research we did found that children of color in our school system were disproportionately affected by obesity, and we know that racial and ethnic minorities in Greenville County Schools are more likely to receive free and reduced meals," Smith says. "By making all school meals healthy, there's no singling out for special programs any students who might have less food access or issues with weight."

### Teaching Them to Fish

But changing the way a large public school system acquires food and prepares and serves meals was far from an easy process.

**Editor's Note:** This article is part of an ongoing Inspiration series that profiles how Southern foundations are using Passing Gear philanthropy to transform their communities. These stories supplement those told in last year's report, *Philanthropy as the South's Passing Gear: Fulfilling the Promise*, released by SECF and the research firm MDC at the 48th Annual Meeting.



*Greenville County Schools cafeteria workers received culinary training that prepared them to provide healthier school lunches.*

from scratch. It has removed all canned fruit and highly processed proteins such as chicken nuggets and chicken patties.

It uses grass-fed beef from a local farmer – making it the first district in the county to be certified to use grass-fed meat.

The students are not only being exposed to healthier foods, but also are expanding their palates and bringing their experiences home to their families. Plus, as they are eating healthier foods, they are less likely to miss school due to illness and more likely to pay attentive during classes.

“There’s no true way to measure the full impact,” says Joe Urban, Greenville County Schools’ director of food and nutrition services. “There’s so many amazing things happening at the same time here. It improves behavior. It improves attendance. There’s fewer lists to the nurse.”

Urban says the program has worked because it was built to make sure that it makes an impact that extends well beyond the initial grant money.

“It’s going to have a sustained impact,” Urban says. “What good is dumping a million dollars into something that happens only once? This is a perfect example of how when it’s done right, it can be sustainable.”

That sustainability means that the program continues to grow and evolve.

Some schools, for instance, have since incorporated healthy habits into the curriculum – working with students to grow lettuce and fresh herbs on campus and to use that food in the meals that are prepared in the cafeteria.

“Because the kids are growing it, they are willing to try it and eat it,” Champion says. “We’re seeing that kids are open to eating more healthy. We’re still in the beginning stages, but we expect that it will change the obesity rate at our school.”

While many of the students might never know that their lives have been affected by the Piedmont Health Foundation, Smith says the foundation has been forever transformed by adopting Passing Gear philanthropy.

“It was worth the investment in time because the outcome has been so dramatic,” Smith says. “It’s incredibly rewarding to know that so many organizations and partners have been able to come together to make a real difference in our community.”

*If your foundation is putting Passing Gear principles into action, SECF wants to hear your story – your work could be featured on our blog, Engage, or in the pages of Inspiration. Contact David Miller, director of marketing and communications, at [david@secf.org](mailto:david@secf.org) to learn more.*

It involved changing a culture and reinventing processes that had been in place for decades. The Piedmont Health Foundation knew that it was unlikely to develop and fund a new process on its own. So, it reached out to the school system to learn what officials thought was needed to make the necessary changes.

“We knew there was a certain way things are happening,” Smith says. “But we also knew there was another way. So we asked them, ‘What do we need to do to make that transition?’”

By asking that question, the foundation and the school district began mapping out a plan.

In 2011 and 2012, the foundation provided seed funding for a culinary training program for Greenville County Schools Food and Nutrition Services staff to learn to cook healthier lunches. For many employees, it meant learning how to trade box cutters and microwaves for chefs’

knives and sauté pans, through a week-long culinary training institute at the local Greenville Technical College.

In 2013, the foundation connected the district to larger funding sources, such as Blue Cross Blue Shield Foundation of South Carolina, Greenville Women Giving, and others. It worked with an origination called LiveWell Greenville to conduct taste tests for students and to enlist the support of teachers and parents. It also provided funding for a communications plan to promote the program on social media.

The school district also began developing partnerships with local farmers to acquire natural foods at a reasonable cost.

## A Model District

Today, almost all of the items on the district’s breakfast and lunch program are prepared



*A few examples of the balanced, nutritious meals now being served in Greenville County Schools.*



# PUTTING MONTESSORI ON THE MAP

## A Family Foundation's Investment and Evaluation Draw International Attention

By Betsey Russell

A series of grants made by the Self Family Foundation – the small, \$32 million family foundation in Greenwood, South Carolina – is garnering international attention because of their impact.

Since the late 1990s, the foundation has made grants to support the expansion of Montessori classrooms throughout the state's public schools. Now, the foundation has also funded a five-year evaluation of its work.

The recently published results – from a study conducted by the Riley Institute at Furman University – show that children in South Carolina's public Montessori classrooms outperform their peers on state standardized tests, demonstrate higher levels of creativity, have higher school attendance, and fewer disciplinary incidents. **More specifically:**

- *Montessori public school students exhibited significantly more achievement growth on state standardized tests than demographically similar non-Montessori students in math, English language arts (ELA), and social studies. The results for science were mixed.*
- *Low-income, Montessori public school students scored significantly higher on state standardized tests than low-income, non-Montessori public school students in ELA, math, and social studies.*
- *Montessori students generally performed better than or similar to non-Montessori students on measures of executive function, although results were mixed.*
- *Montessori students exhibited significantly higher levels of creativity than non-Montessori students.*
- *Montessori public school students*

*consistently demonstrated higher school attendance than similar non-Montessori public school students.*

- *Montessori public school students were significantly less likely to have had a disciplinary incident during the school year when compared to similar non-Montessori students.*

This study, one of the first and by far the largest ever to explore public school Montessori programs, is making a splash in national media and international conferences. Brooke Culclasure, research director at the Riley Institute, has presented findings nationally at the American Montessori Society conference in Denver, and internationally at Montessori gatherings in Prague and Amsterdam. She credits the attention to the Self Family Foundation's willingness to invest in objective evaluation.

"The foundation made investments and wanted to do a rigorous study to make sure their investments paid off," says Culclasure. "The great thing was that they really understood the value of longitudinal research that's rigorous and uses sophisticated methods, and they understood that it takes time to do it right. It's a brave and useful thing to do and makes a lot of sense. A lot of people don't get the importance of evaluation and being able to show what your investment has produced."

Culclasure and her team worked with the foundation's staff and board to design the study, which included one year of planning and four years of data collection. After the first year of data collection, the South Carolina Education Oversight Committee also helped researchers collect additional data and observe more classrooms. The Self Family

Foundation's reputation also helped facilitate data collection from the state Department of Education.

"It was helpful that this was a homegrown effort," says Culclasure. "The foundation knew the local setting and the players and understood Montessori. That not only made the research easier, but they are the reason that South Carolina has the largest number of public Montessori programs in the country. Our state is a leader because of their early investment."

### Small Investment, Big Impact

Hallmarks of Montessori education include multi-age classrooms, uninterrupted blocks of work time, guided choices of work activities, and peer learning. In addition, Montessori classrooms are outfitted with specific learning materials, arranged in a precise way, in strategically designed learning environments. In Montessori education, there are no extrinsic rewards offered or grades assigned, and children are encouraged to explore personal interests while widely engaging with others.

The Self Family Foundation's interest in Montessori education came from the late Virginia Self, daughter of the foundation's founder and longtime board chair. Ms. Self learned about Montessori education when she spent time in London and brought a passionate interest home to South Carolina. Foundation President Frank Wideman III became an avid supporter after visiting the state's first public school Montessori classroom in 1998.

"I credit Ed Taylor, who was the new superintendent in neighboring Laurens County,



*Enter a Montessori classroom and you'll see students quietly and intently engaged in a variety of independent or small group learning activities. Teachers coach and gently guide, rather than lecture.*

In total, that amounted to less than \$1 million over almost 20 years.

"We tried to think strategically," Wideman says. "How do we train teachers? Fund the program at Lander. How do we encourage teachers to participate? Pay their tuition. How do we get the state to invest? Fund a study that shows the return on investment. We made the initial investments, but as we demonstrated interest and impact, others have stepped in to sustain it."

Of course, the foundation's investment wasn't without challenges over the years, and there are still some hurdles to expansion.

"You have to have a principal who believes in Montessori, otherwise leadership can be a barrier within some school districts," says Wideman. "Also, Montessori learning doesn't always match up well with state-mandated standardized testing. And the Montessori approach begins with three-year-olds, which can be a challenge for schools that don't already have pre-K programs."

with introducing me to Montessori education," says Wideman. "He had started a classroom in Clarendon County, one of the poorest areas of the state, and took me there to see it. I was very impressed with what I was seeing, and he explained the Montessori philosophy to me. He wanted to start the same approach in Laurens County, and we helped him do it. That was our first Montessori grant."

From there, the Self Family Foundation board realized that expanding Montessori education to more classrooms would require creating a supply of Montessori-trained teachers. The foundation reached out to nearby Lander University and provided support to integrate Montessori certification into the university's College of Education.

Lander became one of the only universities in the country to offer Montessori teacher education. Undergraduate students can pursue a Montessori education track and

graduate as certified Montessori teachers. Graduate students can include Montessori certification as part of a graduate teaching degree, then return to their districts to help implement the Montessori program.

Lander University and the foundation promoted this opportunity by working with the South Carolina Montessori Alliance. In 2003, the university created the Virginia Self Center for Montessori Excellence. Since then, more than 150 teachers have earned a Montessori certification.

The foundation's financial investment included initial salary support for the Montessori education program director at Lander University, funding for Greenwood County teachers to obtain master's degrees, resources to up-fit existing classrooms to meet Montessori standards in three counties, and, of course, funding for the Riley Institute study.

Parents also can require convincing, since Montessori classrooms look very different from what they may associate with effective learning. Montessori education was initially developed to serve children in low-income communities but can carry an elitist reputation today. In some cases, parents may distrust the motives or methods of public Montessori and reject it.

## Continued Growth Statewide

As the Self Family Foundation made its initial investments in public Montessori education, the State's Department of Education began to take notice. In 2006, Dr. Jim Rex became state superintendent of education and wanted to expand school choice, including the option of Montessori classrooms. He created a new position at the state level to give school districts hands-on help.

South Carolina became the only state at that time to have a full-time Montessori staff person, and since then the number of programs across the state has grown from fewer than 20 to a total of 45 schools in 24 districts and 21 counties at the conclusion of the Riley Institute study.

Today, approximately 7,500 South Carolina students are enrolled in a public Montessori program, and 54 percent of them are from low-income families.

The combination of significant growth and positive findings from the study are more than enough proof for the foundation that the investment has been worthwhile, says Wideman. But the real reward comes from seeing the students in action.

"For me, the biggest win is seeing how kids thrive in our Montessori classrooms," he says. "It's inspiring to watch them become intrinsic learners. That will pay off for the rest of their lives."



*In Montessori education, there are no extrinsic rewards offered or grades assigned, and children are encouraged to explore personal interests while widely engaging with others.*



# Commitments to Diversity, Equity & Inclusion Deserve Smart Consulting

*By Stephanie Clohesy, National Network of Consultants to Grantmakers*

*Stephanie Clohesy is the vice chair of NNCG's steering committee and CEO of Clohesy Consulting. To learn more about the National Network of Consultants to Grantmakers and the DEI Initiative, contact [lori.jane@nncg.org](mailto:lori.jane@nncg.org).*

On February 1, 2018, the National Network of Consultants to Grantmakers (NNCG) launched a new initiative to sharpen the impact of diversity, equity and inclusion (DEI) work in grantmaking by increasing the capacity of consultants and grantmakers engaged in DEI efforts. NNCG believes that funding strategies and program commitments for diversity, equity and inclusion (DEI) deserve smart consulting to help funders and their grantee partners achieve impact.

As part of this initiative, NNCG is expanding its efforts to increase the number of consultants and grantmakers who have experience, skills and/or goals to advance diversity, equity and inclusion as core strategies in grantmaking. Beyond increasing the network of consultants, the initiative will build and support programs that intensify inclusion and make progress towards equity in our institutions and communities. The DEI Initiative will:

- Design reflective practice among consultants and clients so that learning – especially emergent changes in strategy and practices – are noticed, monitored and named. Currently NNCG is hosting a series of webinars exploring consulting practices in DEI consulting. (See [www.nncg.org](http://www.nncg.org) for the schedule of the Equity Webinar Series.)
- Provide training for consultants and grantmakers to improve their skills in analysis, program design, implementation and evaluation in terms of greater diversity and inclusion and measurable improvements in equity.
- Transform the NNCG membership into a Community of Practice through which DEI innovation and experimentation can be shared openly so that all can benefit from the transparency of success and failure.
- Advocate for consulting standards and agreements that recognize commitment to and expertise in DEI.

## First Steps: Documenting What We Know

NNCG's 174 members – consultants and funding partners – innovate daily to meet the needs and aspirations around DEI.

To help launch the initiative, case studies are being created from the experiences of NNCG members. The first case studies – freshly harvested from consulting files and reports – have already yielded valuable lessons for consultants and the grantmakers who want and need smart consulting on diversity, equity and inclusion.

NNCG researchers used a systematic protocol to debrief each consultant on a specific client project focused on using a DEI lens. The case studies created from these interviews show that wisdom and strong norms of practice are emerging in our sector. However, few practices are documented thoroughly or tangibly available to help consultants and funders to do their best work. The NNCG case studies are the first step toward creating consulting tools from the collective experience of members.

SECF members are the first to reap the benefit of NNCG's reflective learning based on these case studies of real experiences from its member funders and consultants. A few tips and insights are crystallizing as key to providing consulting or engaging consultants to help make DEI-related work smarter, better, stronger:

- Consultants should be prepared to help grantmakers define (or refine) the meaning of diversity, equity and inclusion. Don't use these terms with the board, staff, grantees or stakeholders without taking the time to define them. Smart consultants can offer starting definitions and a process for creating clear and useful definitions (even if they change somewhat along the way).

- Work together – consultants and grantmakers – on understanding where equity fits into the funders' values, vision, mission. How does it connect? How does it improve the vision, mission goals? How can the funder embed diversity and avoid a "stick-on" commitment?
- Make room in the process for all partners to understand that equity goes beyond "color" and "geography"; smart DEI consultants will be prepared to help their clients understand the complex intersectional identities and contexts inherent in DEI. Sometimes this includes a "DEI lens" review of current grant portfolios looking for hidden gems or problems.
- A good DEI consulting process helps to distinguish technical and complex dimensions of a diversity/equity/inclusion commitment. This analysis helps the funder to identify their passion for "upstream" or "downstream" interventions. In other words, is the funder interested more in root causes or services and relief?
- The consultant and the funder care about and create a scope of work that helps develop internal leadership skills among staff, board and key consulting teams as well as investing in grantee/community/issue leaders.
- Smart DEI consultants understand and honor emergent strategy and help the funder follow opportunities without overwhelming the size and scale of the funder's capacity. In DEI work, the starting point is usually a brief take-off point for quick and lively evolution of ideas and commitments.

Following these tips and insights for good consulting engagement could make a difference in your impact! Look for more insights, ideas and tools as NNCG's DEI Initiative takes off!

## What is NNCG?

NNCG is the only national network and database of consultants whose experience in philanthropy consulting has been vetted and documented. The network includes both consultant members as well as grantmaking partners who are driven by a belief in and passion for the value of consulting as a bridge between specialized knowledge and the quality of grantmaking where social change impact is highly desired.

## Achievement Gaps in Education Persist Despite Improvements

While the South has made major advances in education in recent decades, the achievement gaps that exist between more affluent students and historically disadvantaged classmates have not only persisted, but have even widened over the past decade, according to *Accelerating the Pace: The Future of Education in the American South*. The report, published by a coalition of nonprofit, nonpartisan agencies across seven Southern states, also noted results from an accompanying survey of Southern voters showing widespread recognition of the need to address disparities in education quality and support for increased funding for public schools.

The report calls for state leaders, educators, and other stakeholders to increase access to quality education by taking steps to improve teacher recruitment and retention, providing holistic support systems for today's students, building a stronger bridge from high school to college and career, and by ensuring that resources are adequate and targeted.

**To learn more, and read the full report, visit the Georgia Partnership for Excellence in Education's website, [www.gpee.org](http://www.gpee.org).**

## *Accelerating the Pace* The Future of Education in the American South



## Report Examines Ideas for Helping People Escape Poverty

Funded by the Bill & Melinda Gates Foundation and supported by the Urban Institute, the US Partnership on Mobility from Poverty brought together two dozen of the country's leading thinkers and practitioners in the area of poverty to answer one over-arching question incorporated into the title of a new report, *Restoring the American Dream: What Would It Take to Dramatically Increase Mobility from Poverty?*

Specifically, the partnership was tasked with generating ideas for investment by philanthropy and the public sector that could make a difference in addressing poverty. This "idea paper" urges funders to take action by changing the narrative that shapes attitudes and policies affecting the poor, by building pathways to employment through job training, by removing systemic barriers to economic mobility, empowering those in poverty to move to self-reliance, and by creating ways to link and share state and local data to help develop more informed programs.

**To read the full paper and learn more about the US Partnership on Mobility from Poverty, visit [MobilityPartnership.org](http://MobilityPartnership.org).**

## .....new members of the SECF family.....

*The following organizations have joined or reconnected with SECF since our previous issue. Look forward to seeing them at our events and programs – and give them a warm welcome!*

The **Alamance Community Foundation**, which recently spun off from The Community Foundation of Greater Greensboro, is based in Burlington, North Carolina. Gavin Sands Stevens is the executive director.

The **Aslan Foundation** has reconnected with SECF. The independent foundation, based in Knoxville, Tennessee, focuses its grantmaking on arts & culture, community & economic development, education, the environment and health. Andrea Bailey Cox is executive director.

The **Bobbie Bailey Foundation** is an independent foundation based in Atlanta, focused on arts & culture, human services and education. Its chairman is Audrey Morgan.

The **Fred B. and Ruth B. Zigler Foundation**, a family foundation based in Jennings, Louisiana, has reconnected with SECF.

The **Greater Pinebelt Community Foundation**, based in Hattiesburg, Mississippi, has reconnected with SECF. Mike Dixon is the executive director.

The **John D. and Catherine T. MacArthur Foundation**, based in Chicago, is expanding its work in the Southeast. The independent foundation's priorities in the region include climate solutions and housing.

The **Methodist Health System Foundation** is a health legacy funder based in Slidell, Louisiana, dedicated to the support, development and management of health-related programs and services for the benefit of the citizens of East New Orleans and beyond. Wendy Beron is the president & CEO.

The **St. Croix Foundation for Community Development** is the first SECF member from outside the mainland U.S. Located in Christiansted on Saint Croix, part of the U.S. Virgin Islands, the community foundation serves as both a strategic grantmaker and a direct services provider. Deanna James is the executive director.

The **Zalik Foundation** is a family foundation based in Sandy Springs, Georgia, focused on arts & culture, community & economic development, education, the environment and health. Amanda Abrams is the executive director.

# southeastern soundings

**Tammy Caudell** has joined the board of the North Georgia Community Foundation. She is the senior project manager for the Georgia Department of Economic Development in north Georgia.

The Sisters of Charity Foundation of South Carolina has hired **Erica Wooten** as program and initiatives manager. She previously worked for Providence Hospital and Providence Health in marketing and fund development. The foundation has also promoted **Meredith Mathews** to program manager.

**Mark Carter**, CEO of Passport Health Plan, has been named chair of the board of directors of the Foundation for a Healthy Kentucky. Carter has been a member of the foundation's board for 12 years, from 2003 to 2010, and again since 2013. The foundation has also promoted **Bonnie Hackbarth** from communications director to vice president, external affairs.

**Stan Little** has been named president of the SunTrust Foundation. He joined SunTrust in 2015 as senior vice president for marketing strategy and operations.

The Quantum Foundation has added **Brian Kirkpatrick, Dr. Jessica Morlok-Prince** and **Dr. Ronald Romear** to its board. Kirkpatrick is the CFO of Neptune Research, Inc., a multinational composites manufacturing company. Morlok-Prince is the medical director of the pediatric emergency department of West Boca Medical Center. Romear is the owner and managing partner of a pediatric medical practice in West Palm Beach, Florida.

The Greenwood County Community Foundation recently announced that **Virginia Gay McHugh** and **Wells Dunlap** have joined its Board of Directors. McHugh is an educator and education administrator. Dunlap is a Greenwood native and currently works as the financial analyst and CRA officer for Countybank.

The Coastal Community Foundation of South Carolina announced the promotion of **Melissa Levesque** to Vice President of Development & Stewardship. Levesque came to the Foundation last fall from Cornerstone Philanthropic Advisors, LLC. The foundation has also hired **Helen Wolfe** as stewardship officer after nearly 10 years in development for arts and cultural institutions in Charleston. **Prenita Mack** has also joined the foundation's staff as executive assistant to its senior management team.

**Julia W. Taylor** and **Michael R. Meyers** have joined the Board of Trustees of The Community Foundation for Northeast Florida. Taylor has had an active career in both the private and nonprofit sectors, including director of community affairs at the University of North Florida College of Business. Meyers, who recently retired from a career as a lawyer, is an active board member for and trusted advisor to many for-profit and not-for-profit organizations.

**J. Trent Jones**, a partner with Hall and Hall Ranch Brokers in Sun Valley, Idaho, has been elected a trustee of The Duke Endowment.

The Woodward Hines Education Foundation has elected two new members to its board of directors, **Robert E. Leard, IV**, and **Debra Barnes McGee**. Leard works at Regions Bank as a commercial banking executive for Mississippi. McGee serves as the senior vice president and director of minority business development at BankPlus in Jackson, Mississippi.



A close-up portrait of Deanna James, a Black woman with short, curly dark hair, smiling warmly at the camera. She is wearing a red top and small hoop earrings. The background is a soft-focus green, suggesting an outdoor setting.

## Deanna James

*Executive Director, St. Croix Foundation*

*St. Croix – part of the U.S. Virgin Islands – is both the most southern and most eastern territory of the United States. But that’s not the only reason the St. Croix Foundation applied to be part of SECF. The foundation serves a unique community, but Executive Director Deanna James says several commonalities, plus some Southern hospitality, were what brought the organization into the SECF family.*

***The Southeast is no stranger to hurricanes, but St. Croix was particularly hard hit last year. What can you tell us about recovery efforts, and what role the foundation has played?***

In the fall of 2017, the U.S. Virgin Islands (USVI) was devastated by the catastrophic force of two back-to-back Category 5 superstorms in 10 days. Today in St. Croix, eight of 13 public schools are condemned, many governmental systems, which were struggling before the storms, are now completely dysfunctional, the island’s only community hospital is scheduled to be decommissioned, and basic emergency 911 systems are unreliable. Conditions like these are challenging anywhere, but for a geographically isolated island community, they can be life-endangering. As such, building philanthropic capacity to support our community amid this crisis, and for the long-term, has been St. Croix Foundation’s (SCF) primary focus over the past 6 months.

Within days of Hurricanes Irma and Maria, St. Croix Foundation launched the Caribbean Assistance and Recovery Effort (CARE) Fund to provide direct support for front-line relief and long-term recovery on St. Croix. Through our CARE Fund, SCF is doing what we do best: supporting holistic community development while ensuring equity and nurturing resilience.

In September of 2016, exactly one year prior to the hurricanes, the foundation launched our Nonprofit Consortium seeking to build a strategic framework and collective vision for new approaches to strengthening and stabilizing St. Croix’s nonprofit sector. As

a result, we were able to begin convening consortium partners immediately after the storms to leverage our collective resources and meet the needs of our most underserved residents.

***What other issues on the island does the foundation focus on?***

The core pillars of our programmatic field include public policy, community revitalization, nonprofit development, and strategic grantmaking. More recently, because of our fundamental belief that educational excellence and access is the single greatest insurance for our territory’s health and prosperity, over the past 10 years SCF has become the fiercest advocate for equity and innovation in education in the USVI.

***How did you get introduced to SECF and what made you want to join?***

In February of 2017, St. Croix Foundation convened seven national senior philanthropic executives including Janine Lee. Our short-term goal was to introduce national philanthropic leaders to the territory to expose them to our shared histories and common challenges and assets. The long-term goal was to build enduring relationships with leaders in the field.

I was subsequently invited to attend SECF’s Annual Meeting in November of last year, just two months after the hurricane. I was so moved by the commonalities between our stories and the philanthropic landscape in the U.S. Caribbean and those of so many small foundations in the Southeast that

we immediately asked to apply for official membership.

***What do you hope to learn from connecting with SECF members – and what do you think those of us on the mainland can learn from the St. Croix Foundation?***

Because so many in the Southeast have gone through numerous natural disasters and because disaster recovery presents such unique challenges to small, rural and poor communities, we know we have a great deal to learn from SECF members. As we strive to navigate the complexities of the recovery process, and the growing “business” of disaster recovery, we are committed to remaining vigilant and to advocating for a holistic recovery that ensures equity and empowerment for our most vulnerable residents.

On the flip side, we fundamentally believe that St. Croix Foundation’s operating format and the deep enduring relationships we have fostered with our local nonprofit sector is a model for the field of philanthropy. In reality, so much about our community is truly unique. We are amazingly diverse by national standards, something which continues to surprise national funders. We also believe in philanthropy! In its purest definition, philanthropy means the love of humanity and we work diligently at St. Croix Foundation to stay mindful of that every day.

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*To support the St. Croix Foundation’s hurricane relief efforts, visit [stxfoundation.org/hurricane-recovery/care-fund](http://stxfoundation.org/hurricane-recovery/care-fund).*



## ..... have you renewed your **SECF Membership?** .....

It's not too late for you to renew your commitment to SECF, giving you the opportunity to stay connected with, and contribute to, a group that represents the best of Southern Philanthropy. You can get started now by visiting [SECF.org/renew-your-membership](https://secf.org/renew-your-membership).

By renewing your membership, you'll maintain access to a responsive staff, an incredible professional network and a packed lineup of events and programs – including the ones listed below!

## ..... calendar of **events** .....

### **Family Foundations Forum · June 13–15 · Asheville, NC**

The Family Foundations Forum brings together staff, trustees and family members to discuss issues unique to the management and effectiveness of family foundations. This conference, held at the beautiful Omni Grove Park Inn, offers sessions and interactive conversations for family foundation veterans, the next generation and everyone in between. *This year's Family Foundations Forum immediately follows NCFP's Courage to Lead Retreat on June 12-13!*

### **Community Foundation Boot Camp · June 27–28 · New Orleans, LA**

The two-day Community Foundation Boot Camp program offers a comprehensive overview of the structure and operations of community foundations. It provides an in-depth introduction to community foundations for new staff and board members, as well as experienced grantmakers looking for a good refresher. *Registration now open!*

### **Corporate Grantmaker Workshop · July 26 · Atlanta, GA**

SECF and ACCP will team up once again to offer a day-long workshop devoted to the unique issues, questions and opportunities facing staff of corporate foundations and giving programs. The workshop will focus on a particular aspect of corporate grantmaking while touching on a number of issues, including fundraising, volunteering and social responsibility. *Registration opens soon!*

### **Essential Skills & Strategies · August 22–23 · Birmingham, AL**

Essential Skills & Strategies for New Grantmakers, offered twice a year, connects those new to philanthropy with an experienced faculty comprised of SECF members. The two-day training delivers a curriculum designed to give attendees a greater understanding of the ins-and-outs of grantmaking. *Registration for the Summer course is will open at SECF.org in May!*

### **Conference on Investing · November 7 · Louisville, KY**

The Conference on Investing, offered as an Annual Meeting preconference, is a one-of-a-kind gathering providing members the knowledge and insight to make informed, empowered and strategic financial decisions that will ultimately improve foundations' investment portfolios and grantmaking opportunities.

### **SECF's 49th Annual Meeting · November 7–9 · Louisville, KY**

The 49th Annual Meeting will bring together hundreds of grantmakers in Louisville, Kentucky, for three days of education, connection and inspiration. SECF's Annual Meeting is the premier networking opportunity all year for senior leaders, trustees and staff representing the full diversity of Southern Philanthropy. Throughout the Annual Meeting, you'll hear from experts and thought leaders on the latest trends and emerging best practices, examples of success and lessons learned, and moving stories sure to leave you inspired and renewed. *There's no other event like it – and it's one you can't afford to miss. Registration opens in May!*

..... Please visit [SECF.org](https://secf.org) for additional in-person and virtual programs .....