



MID-SHORE COMMUNITY FOUNDATION

# *Building Community*



2013 REPORT TO THE COMMUNITY

## 2013 Officers

Moorhead Vermilye, Chair

John Dillon, Vice Chair

Brett Summers, Secretary

David Nagel, Treasurer

## 2013 Board of Directors

Jean Anthony, Kent

Joseph Anthony, Talbot

Dick Barker, Kent

Scott Beatty, Talbot

William "Bill" Boyd, Talbot

Elizabeth Brice, Queen Anne's

Art Cecil, Talbot

Stuart "Mickey" Elsberg, Kent

Mark Freestate, Queen Anne's

Wayne Howard, Caroline

Lynn Knight, Queen Anne's

Neil Lecompte, Queen Anne's

John Lewis, Queen Anne's

Sandy McAllister, Dorchester

John McGinnis, Dorchester

Alice Ryan, Talbot

Win Trice, Queen Anne's

Barbara Viniar, Talbot

Hubert Wright, Dorchester

## Staff

W. W. "Buck" Duncan, President

Stuart M. Bounds

Robbin Hill, Chief Program Officer

Heather Moore, Chief Financial Officer

Heather Pickens, Administrative Assistant

## MSCF welcomes new board members



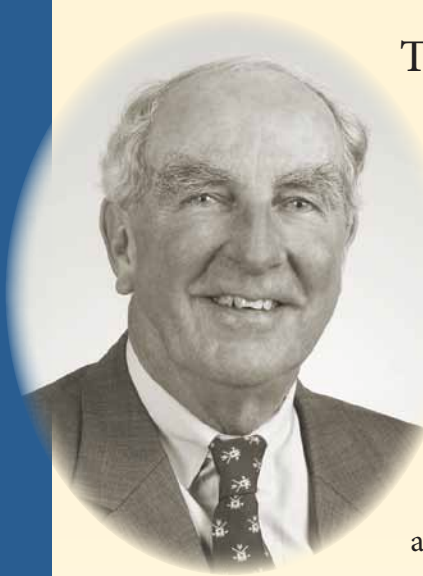
Richard "Dick" Barker  
Business Executive,  
Kent County



William "Bill" Boyd  
Senior VP, PNC Bank,  
Talbot County

Cover photo by Katie Sevon, Board Member,  
Chesapeake Multicultural Resource Center

# Letter from the Chairman



## This spring we were delighted to announce

the appointment of William W. "Buck" Duncan as the 4th President of Mid-Shore Community Foundation. Buck recently retired as President of Talbot Bank after 40 years in Eastern Shore banking. He is a native of the Eastern Shore and has devoted his career to economic and business development on the Shore through his work in community banking. Buck's experience and understanding of the Mid-Shore area will be invaluable assets to the Foundation. We are also grateful to Stuart Bounds for his service as president these past four years. Our operations are fiscally and administratively sound and we have seen significant growth in our assets and grant making during his tenure as President.

This year we are also losing the services of four members of the Board of Directors.

Margaret Riehl, Mike Menzies, and Keith McMahan have completed their second term on the Board and each has made significant contributions to the work of the Foundation. We are particularly grateful for Margaret's service as Chair of the Institutional Development Committee and as a member of the Executive Committee. In addition, Derrick Daly stepped down from the Board this year but will continue to work with the Foundation to promote access to higher education.

Lastly, this has been a banner year both in terms of contributions to the Foundation—\$3,661,510—and grantmaking—\$2,218,783. Perhaps most significant is the new scholarship fund established through the estate of Roberta "Bobbie" Holt that will provide extraordinary levels of scholarship support to residents of Caroline County in perpetuity. Please enjoy reading about all that has been accomplished this past year in the pages of this report.

W. Moorhead Vermilye  
Chairman



Alex Handy accepts the J. McKinney Willis, Jr. Award on behalf of the Society of St. Vincent de Paul.



Tom Beckett accepts Town Watch Award from Mickey Elsberg, MSCF Board Member.



Genie Wootton accepts the Golden Key Award from Stuart Bounds, retiring MSCF President.

## Non-profit and Community Volunteers Honored

### The J. McKinney Willis, Jr. Community Service Award

The Society of St. Vincent de Paul, Sts. Peter and Paul Parish, received the 2013 Community Service Award for 35 years of assistance to individuals and families in need in Talbot County. This all volunteer organization gave rent assistance, utility assistance, provided shelter, distributed food and provided furniture, clothing, and housewares to approximately 400 families in 2013. The Society also started a home visitation program to accommodate the lonely and frail elderly in the community.

Alex Handy was recognized for his volunteer leadership throughout much of the history of The Society. His remarkable commitment and that of over 200 volunteers have enabled the organization to function with no paid staff!



### The Town Watch Society

Thomas Beckett was inducted into the Society for his volunteer efforts in Kent County since 1992. Tom has been involved in and in many instances served in leadership positions in the United Way of Kent County, the Kent County Economic Development Advisory Board, the Service Core of Retired Executives, Junior Achievement, and the Kent County Advisory Board for the Mid-Shore Community Foundation, among other organizations. Tom stands out as an exemplary leader in the community.

### Golden Key Society

Eugenia Wootton, was inducted into the Golden Key Society for her work in promoting philanthropy throughout the Mid-Shore region, and especially in Kent County. Genie is a partner with Raisin and Wootton in Chestertown and a strong advocate for her community and for service to her clients.



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## *Open a Fund*

### Peter and Marianne Byrnes were the Founding Contributors to a Fund to Benefit the Immigrant Community on the Mid-Shore

Peter and Marianne’s interest in the immigrant community goes back to their years in college in Miami, Florida where they met. Marianne attended Barry University which at the time was an all-girls Catholic college and Peter was enrolled at St. Thomas of Villanova University, which had been moved in its entirety from Cuba together with most of its faculty. While Peter’s career with Winchester Homes in the suburban Washington area led him to appreciate how critical the immigrant community was to the construction industry, it was his volunteer experience as the owner’s representative developing a new Multicultural Center and a separate day laborer and training center in Langley Park that convinced him of the need to help these workers and their families achieve their full potential.

When he finally retired in 2004, after commuting from the D.C area to Easton for seven years, he had as he likes to say “a light bulb moment” and realized that he was meant to do something similar to the Multicultural Center in Langley Park here on the Mid-Shore. Meanwhile, Marianne became involved with an initiative linked to their church to help the immigrant community in the Easton area with a focus on household support. Once Peter completed a leadership commitment with The Chesapeake Bay Trust, he and Marianne then decided to explore the need for a multicultural support center in the Mid-Shore area.

In 2011, Peter paid a visit to the Mid-Shore Community Foundation to see how we might help with his initiative. After exploring several options, Peter realized that the most immediate need was support for immigrant children and the new Chesapeake Multicultural Center was established and began its first program, homework help and youth development. Peter and Marianne note that, “the children we help in the after school program are bright and enthusiastic. Just like our own grandchildren, they love the Ravens and dislike the Steelers; they have authentic American spirit. Giving them the extra help needed to achieve their potential is a critically important community investment.”

Through their generous philanthropy and their commitment of volunteer time to the new Center, Peter and Marianne have indeed made an important investment in this community. “This work is a way to honor our grandparents, all of whom were immigrants or children of immigrants. Like them, the Shore’s new immigrant population is driven by the dream of a better life for their families.”

*The children on the cover of this report are participants in the after school program sponsored by the Chesapeake Multicultural Center at the Oasis Covenant Church in Easton.*

## How can you contribute?

### 1. Give to the Founders’ Fund of the Mid-Shore Community Foundation

Make a gift to our permanent endowment, and enable us to address the current and future needs and opportunities of our region, and its people. Gifts can also be targeted to one of the five Mid-Shore counties – Caroline, Dorchester, Kent, Queen Anne’s, and Talbot, and at certain levels, be established as named funds.

### 2. Open a Fund

Establish a new fund at MSCF to address specific areas of interest within the community, to provide scholarships and educational grants for future leaders, or to support a specific charity. New funds can be created with an initial investment of at least \$10,000.

### 3. Volunteer

Join your colleagues and friends within the community as a volunteer on one of the MSCF advisory committees, or in support of one or more of our 60+ nonprofit partners.

### 4. Leave a Legacy

Plan a gift with MSCF to address the causes you care about and to reflect how you would like to be remembered within your community. We have a number of planned giving options.

*Visit us at [www.mscf.org](http://www.mscf.org) to learn how you can support this community by becoming a donor.*

## Roberta B. Holt Bequest funds education for Caroline County students

# Through Scho

**Roberta B. Holt Scholarship** provides up to \$10,000 per year for a maximum of 4 years for Caroline County residents admitted to or enrolled in a two or four year post-secondary institution of higher learning, or in a licensed vocational-technical program.



**Roberta B. Holt Scholarship Recipients** Front row, left to right: Samantha Stelz, Michelle Benton, Courtney Utberg, Haley Reed, Dreama Stafford, recipients; Back row, left to right: Haines Holt; Recipients Ray Bennett for Hunter Bennett, Max Grable, Madison Parks



**Roberta Baxter Holt** was a native of Federalsburg and a graduate of Federalsburg High School in 1959. She was a research associate in the Laboratory of Brain Evolution and Behavior at the National Institutes of Mental Health and had a long and successful career as a psychotherapist with a family oriented practice. Throughout her extraordinary career, Dr. Holt remained connected to her Federalsburg roots. Roberta “Bobbie” Holt exemplified her personal philosophy of doing something productive every day to further yourself or humankind. This extraordinary scholarship program was established to fulfill her commitment to education and to her native Caroline County.



**The Roberta B. Holt Dual Enrollment Grant** is available to North Caroline High School and Colonel Richardson High School juniors and seniors attending Chesapeake College while enrolled in high school. The grant covers the participant’s total direct costs for attending Chesapeake College, including textbooks. Thirty-one students participated in the program in Spring, 2013.



Above: Colonel Richardson High School Dual Enrollment students

Left: North Caroline High School Dual Enrollment students

*“We appreciate the incredible generosity of Dr. Holt, and the commitment of those involved in this scholarship program to providing Caroline County students with early college access through the Dual Enrollment Program.”*

—Barbara Viniar, *President, Chesapeake College*

## 2013 MSCF Scholarship Recipients

**B.A.A.M. College Assistance Scholarship**

Gordon Jeter  
Romelo Thomas

**Nicholas E. Bramble Scholarship**

Adrian Brice  
Zach Correa  
Shane Fisher  
Ian Lopez  
Kasey Nelson  
Amy West

**Centreville High School Alumni Association Scholarship**

Eleanor Cain  
Emily Cain  
Lacie Geisel  
Sydni Reinhold

**Marci Bee Dayton Memorial Scholarship**

Alexis Pullara

**Dorchester Heritage Museum/Dale Price Memorial Scholarship**

Carlie Marshall

**Frederick Douglass Scholarship**

Shane Fisher  
Ian Lopez

**Margaret Ferree Memorial Scholarship**

Mona Patel

**Dr. Jay Harper Memorial Scholarship**

Connor Burton

**Grover Bert Hastings and Bernice Wooters Hastings Scholarship**

Brandy Ferguson

# Scholarship Endowments

**\$410,480 Awarded to 72 Students in 2013**

## The Pooled Scholarship Application

Students may apply for more than one scholarship through a single application for the 8 scholarships included in the pool. Applications are evaluated by a selection committee established by our Board of Directors, and recipients are selected on the basis of the specific criteria established by the donor. For more information, check out the Pooled Application Program at [www.mscf.org/scholarships](http://www.mscf.org/scholarships). In 2014, students will be able to apply online for the scholarships in the Pool.



### MSCF Scholarship Committee

Alice Ryan, Chair; Elizabeth Brice, Dale Brown, Art Cecil, Lamont Cooke, Susie Dillon, Wayne Howard, John Lewis, Clay Railey, Jennifer Stuart, PJ Townsend, Meg van den Berg, M. Bruce Wellington; Robbin Hill, MSCF Staff

## MSCF hosts 1st Annual Scholarship Awards Breakfast



### Austin and Martha Steele Scholars

Left to right:  
Dreama Stafford, Rebekah Palamaras, Megan Harper, Nicole Gould, Emma Harvey

Alice Ryan, Chair  
Scholarship Committee



### Frederick Douglass Honor Society Scholars

left to right:  
Eric Lowery, Karen Shook, Richard Potter, Committee;  
Front: Shane Fisher and Ian Lopez recipients.



*"We decided this year to consolidate our awards in one program so that we could properly celebrate each of our recipients and honor the donors that made the scholarships possible."*

—Alice Ryan

#### Carter and Marion Hickman Memorial Scholarship

Emily Hawthorne

#### Roberta B. Holt Scholarship

Hunter Bennett  
Michelle Benton  
Max Grable  
Madison Parks  
Haley Reed  
Dreama Stafford  
Samantha Stelz  
Courtney Utberg

#### Timothy Kern Memorial Scholarship

Benjamin Hilyard

#### Dick Kleen Award

Bonnie Barrett

#### Lewin/Kent Island High School Theatre Award

Tabitha Lundstrom

#### Medical Auxiliary Scholarship

Morg Danenmann  
Phillip Dyott

#### Andrew M. Radcliffe Scholarship

Kavon Harris

#### Dr. Harold & Marjorie Shirk Scholarship

Kyle Chatham  
Skye Craig  
Phillip Harris  
Tyler Johnson  
Ashley Oliver  
Rose Rowe  
Zita Seals  
Jeffrey Winslow

#### Pauline and Shirley T. Smith Scholarship

Jeovanna Adrian-Estevez  
Grace Anstatt  
Michael Branham  
Brendan Butler  
Manar Dajani  
Norleen Furrroughs  
Trisha Germann  
John Handley  
Nichole Harding  
Andrea Hrobar  
Sampson Khadijah  
Katie Lynch  
Cynthia Link  
Cassidy Mister  
Dale Payne  
Shannon Ryan  
Samuel Stenecker  
Courtney Utberg  
Amanda Ward  
Colleen Wilson

#### Austin & Martha Steele Scholarship

Nicole Gould  
Megan Harper  
Emma Harvey  
Rebekah Palamaras  
Dreama Stafford

#### Robert F. Walls Memorial

Michelle Benton

#### Washington College Arts Scholarship

Taylor Goss

#### Marlin Zimmerman Scholarship

Allison Szymanski, pictured at right



# Create a Fund... Leave a Legacy

## New Funds at MSCF

- The Clifton Fund
- The Breezy Point Fund
- The Dorchester County Historical Society Endowment Fund
- Chestertown Wildlife Scholarship Fund
- Eastern Shore Land Conservancy Endowment Fund
- Easton Airport Day Fund
- Easton Downtown Partnership Fund
- The Easton Choral Arts Society Endowment Fund
- The Roberta B. Holt Fund;  
The Roberta B Holt Scholarship Fund
- Timothy Kern Memorial Fund
- Michael D. Kilgus Dollars Fore Scholars Foundation
- Imagination Library Talbot County Fund
- Kent Forward
- Edmund Lindemuth & Melvyn Schofield Fund
- Mid-Shore Animal League Fund
- The Miles River Yacht Club Foundation
- Margaret Ferree Memorial Scholarship Fund
- St. Michaels Concours d'Elegance Fund
- The Wolin Fund for Youth in Foster Care

## Non-Profit Partners

- Non-profit Partners:
- Academy Art Museum
  - ACE Mentor Program of Maryland's Eastern Shore
  - Avalon Foundation
  - Bay Hundred Community Pool
  - Boy Scouts of America, Del-Mar-Va Council
  - Caroline Hospice Foundation
  - Caroline Human Services Council
  - CASA of Talbot and Dorchester Counties
  - Channel Marker
  - Chesapeake Bay Maritime Museum
  - Chesapeake Chamber Music
  - Chesapeake College Foundation
  - Chesapeake Culinary Center
  - Chesapeake Film Festival
  - Chestertown Wildlife
  - Chesterwye Center
  - Church Hill Theatre
  - Crossroads Community
  - Delmarva Community Services
  - Dorchester County Historical Society

## The Story of a Fund's Creation

**M**elvyn Schofield and Edmund Lindemuth resided in Kent County and had been partners for 23 years. Edmund was a physician and had retired from the State of Maryland. His charitable interests primarily focused on animal care in Kent County. Edmund passed away in 2001. Melvyn's career had been in art and antiques. Shortly before Melvyn's death in 2012, he met with a local estate lawyer and decided to leave his residual estate to create an endowment at the Mid-Shore Community Foundation to benefit Kent County and the Mid-Shore region in perpetuity. Through the endowment, Melvyn Schofield and Edmund Lindemuth have created a legacy that will be an ongoing support to their community.



Melvyn Schofield  
and Edmund Lindemuth

## Fundraising/Program Partners

- Eastern Shore Land Conservancy
- Easton Choral Arts Society
- Easton Volunteer Fire Department
- Foundation for Kent County Public Library
- Freedom Rowers
- Friends of Wye Mill
- Girl Scouts of the Chesapeake Bay
- Habitat for Humanity Choptank
- Historical Society of Talbot County
- Hospice of Queen Anne's
- Mid-Shore Mental Health Systems
- Mid-Shore Riverkeeper Conservancy
- Miles River Yacht Club Foundation
- Old Wye Church
- Oxford Community Center
- Pickering Creek Audubon Center
- Queen Anne's County Arts Council
- Radcliffe Creek School
- Richardson Maritime Museum
- Rural Life Museum of Trappe
- Salisbury University Foundation
- St. Luke's Chapel
- St. Michaels Concours d'Elegance
- Sultana Projects
- Talbot County Education Technology Foundation
- Talbot Hospice Foundation
- Talbot Mentors
- Talbot Optimist Club
- Talbot Partnership
- United Fund of Talbot County
- United Way of Kent County
- Upper Shore Aging
- Waterfowl Festival
- Wye River Upper School

- Bonnie Hilghman Cancer Fund
- CarePacks Talbot County
- Carpe Diem Arts Outreach Fund
- Character Counts! Kent County
- Chesapeake Multicultural Resource Center
- Chestertown Book Festival
- Dancing for the Dogs
- Dave Haslup/Lou Gehrig Athletic Scholarship Foundation
- Easton Airport Day
- Easton Downtown Partnership
- Empty Bowls Dorchester
- Empty Bowls Talbot
- Eventful Giving
- Frederick Douglass Day - Honor Society
- Geographic Educators Project
- Imagination Library Talbot County
- James Marion Bryan, Jr. "Building Dreams for Youth" Foundation
- Kent Forward
- Marie Harkowa Patients in Need Fund
- Michael D. Kilgus Dollars Fore Scholars Foundation
- Mid Shore Animal League
- Mid-Shore Community Band
- Mid-Shore Wounded Veterans Program
- Nicholas E. Bramble Foundation
- Nick Spry Memorial Fund
- Operation Christmas Spirit
- Our Hearts for Kids
- Oxford Day
- Richards Memorial Park Fund
- Spring Hill Cemetery Fund
- Talbot County Youth Livestock Fund
- Talbot Interfaith Shelter
- Women & Girls Fund of the Mid-Shore



MSCF new partners in 2013 include Kent Forward and Eastern Shore Land Conservancy.

Concours d'Elegance has chosen to donate all proceeds from this year's event on September 29 at the Hyatt in Cambridge to MSCF.



# Through Grant-Making

2013 was a record year—  
\$2.2 million in grants & related expenses

## 2013 Grants by Category

Education  
Youth Development  
60%  
\$1,332,402

Human Services  
Community  
Development  
Disaster Relief  
18%  
\$408,097

\$172,507

Arts & Culture  
Historical  
Preservation 8%

\$121,909

Health & Disabilities  
6%

\$121,591

Animal Welfare 5%

\$59,290

Environment 3%

## Highlights In Grant Making



George B. Todd Fund grant recipients

**George B. Todd Fund** awarded \$230,874 in grants to 28 organizations serving Dorchester County.

**The Women and Girls Fund** made 17 grants totaling \$29,720.

**MSCF Awarded 25 Grants** to various non-profits providing over \$121,000 for the care of animals in our region.

**The Dave Haslup /Lou Gehrig Athletic Scholars Fund** awarded \$17,500 in 3 grants to Chesapeake College, Brigance Brigade Foundation, and the Pop Warner Little Scholars, Inc.

**The Maggie Ferree Fund** provided a grant of \$50,000 to the Talbot Hospice capital campaign.

**The Two Feet on the Ground Fund** granted \$10,000 to support the Eastern Shore Mission of Mercy Dental Clinic.

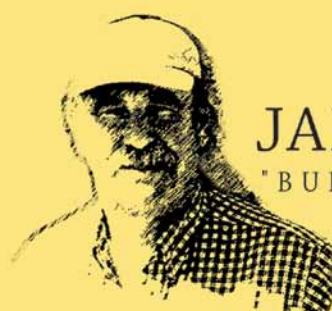
## James M. Bryan Fund Celebrates 10 Years at MSCF

**\$485,516 in 222 Grants since the Fund's inception in 2003!**

Partnering with MSCF has enabled the fund to achieve its mission to: "Help ensure that all children on the Eastern Shore have the opportunity to experience personal growth through participation in youth sports, recreation and development programs."



Shore Plates is another community initiative that benefits the Bryan Foundation.



**JAMES M. BRYAN, JR.**  
"BUILDING DREAMS FOR YOUTH"  
FOUNDATION



## MSCF continues to meet national standards of excellence

The National Standards Seal by our name indicates official confirmation from the Community Foundations National Standards Board that we have met the most rigorous standards in philanthropy. It says our grantmaking includes an open, competitive process designed to address the challenging needs of our community. The National Standards Seal also confirms our history of honoring donors' wishes.



## Financial Summary 2013

MSCF had a record setting year in 2013 with a total of \$7,448,101 in donor contributions and investment returns, an increase of 66% over FY 12. This increased overall investments in FY 13 to just under \$41 million with total assets at year end at \$46,052,245, an annual increase of 12%. The most significant factor in the growth in assets was over \$3.7 million in investment returns reflecting a very good year in the equity markets. Donor contributions were also significant at \$3.7 million due primarily to estate distributions and the large number of new funds established at the Foundation.

The Foundation also set a new record in grants and charitable expenses in FY 13—\$2,218,783! This reflects a 41% increase over last year, with a significant growth in scholarship awards contributing to that increase.

Operating expenses at the Foundation totaled \$568,000 which represented a slight increase from FY 12. Last year there were some significant one-time expenditures relating to retirement contribution adjustments and to the Bullitt House that offset modest increases in compensation for MSCF staff in FY 13. Significantly, the Foundation continues to operate very efficiently with expenses at 1.2% of assets, which is well under the level of community foundations in the same asset class.

W. W. "Buck" Duncan, *President*



## Your great-grandchildren will be glad we met.

Establishing a legacy comes with its challenges. Considering the complexities of legislation, it is crucial that you consult with knowledgeable and experienced professionals to help you protect your estate.

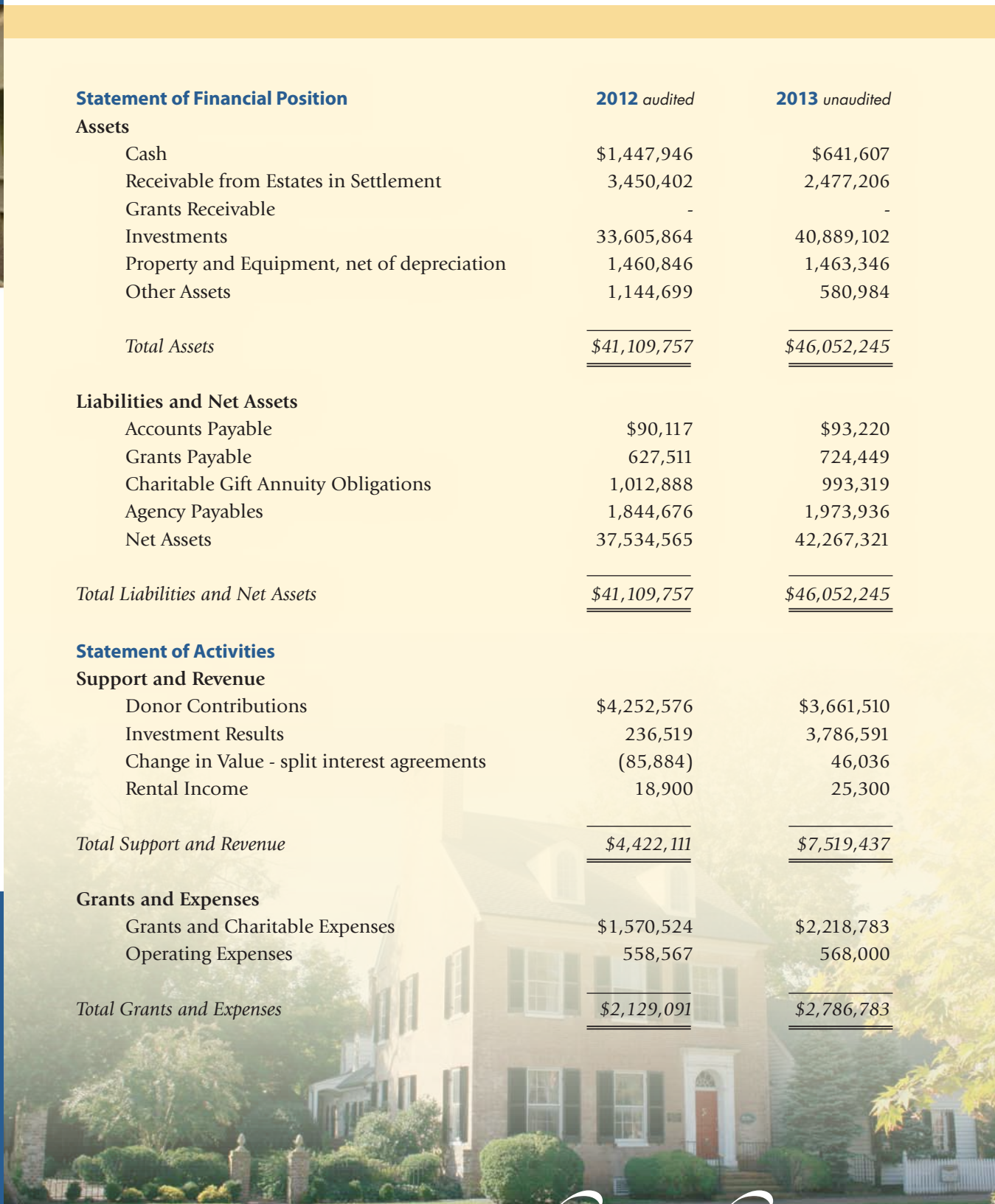
As Financial Advisors, we have the resources to help you with your estate planning needs, and the resources that are necessary to stay on top of constant changes. Call us to learn more, and to plan for generations to come.

### The Hill Group at Morgan Stanley

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| Statement of Financial Position             | 2012 audited        | 2013 unaudited      |
|---------------------------------------------|---------------------|---------------------|
| <b>Assets</b>                               |                     |                     |
| Cash                                        | \$1,447,946         | \$641,607           |
| Receivable from Estates in Settlement       | 3,450,402           | 2,477,206           |
| Grants Receivable                           | -                   | -                   |
| Investments                                 | 33,605,864          | 40,889,102          |
| Property and Equipment, net of depreciation | 1,460,846           | 1,463,346           |
| Other Assets                                | 1,144,699           | 580,984             |
| <i>Total Assets</i>                         | <u>\$41,109,757</u> | <u>\$46,052,245</u> |
| <b>Liabilities and Net Assets</b>           |                     |                     |
| Accounts Payable                            | \$90,117            | \$93,220            |
| Grants Payable                              | 627,511             | 724,449             |
| Charitable Gift Annuity Obligations         | 1,012,888           | 993,319             |
| Agency Payables                             | 1,844,676           | 1,973,936           |
| Net Assets                                  | 37,534,565          | 42,267,321          |
| <i>Total Liabilities and Net Assets</i>     | <u>\$41,109,757</u> | <u>\$46,052,245</u> |
| <b>Statement of Activities</b>              |                     |                     |
| <b>Support and Revenue</b>                  |                     |                     |
| Donor Contributions                         | \$4,252,576         | \$3,661,510         |
| Investment Results                          | 236,519             | 3,786,591           |
| Change in Value - split interest agreements | (85,884)            | 46,036              |
| Rental Income                               | 18,900              | 25,300              |
| <i>Total Support and Revenue</i>            | <u>\$4,422,111</u>  | <u>\$7,519,437</u>  |
| <b>Grants and Expenses</b>                  |                     |                     |
| Grants and Charitable Expenses              | \$1,570,524         | \$2,218,783         |
| Operating Expenses                          | 558,567             | 568,000             |
| <i>Total Grants and Expenses</i>            | <u>\$2,129,091</u>  | <u>\$2,786,783</u>  |



*Treasure the Shore*



## Mid-Shore Community Foundation

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