

2021 ANNUAL REPORT

Stewarding a Legacy of Philanthropy



*Suffolk
Foundation*

Improving our community...one gift at a time

PRESIDENT'S LETTER



The opportunity to serve Suffolk and Western Tidewater as the first female president of the Suffolk Foundation is one of the highlights of my career. Diversity, inclusion, and continued good stewardship persisted as a focus of 2021. It was an honor to play a small part as this important philanthropic organization diversified in ways which reflected the community, as it carefully responded to the needs of Suffolk and Western Tidewater. This strengthened our capabilities as the growing donor population found us to be representative of itself and its values while remaining a safe and reliable conduit for philanthropic giving.

It was gratifying to watch our community demonstrate consistent and increasing generosity, even throughout the pandemic years. The Suffolk Foun-

ation asset size grew to over \$12 million in 2021. This growth was a direct reflection of the community's confidence in the stewardship of the Suffolk Foundation's leadership at the Board of Director's level, as well as among its staff and volunteers. We continued to be innovative thinkers with integrity, vision, and ingenuity. Our donors and friends trusted us to distribute Grants and Scholarships as well as assist with Donor Advised Funds. Philanthropic-minded donors enjoyed great community impact by working with the Suffolk Foundation. We are honored by the trust placed in us.

As an example of this trust, our donors enabled the Suffolk Foundation to provide Community Impact Grants to nonprofit organizations supporting the health and humanitarian needs of a wide array of people within our service area. Our Distribution Committee members spent quality time reviewing applications with well-thought discussions regarding the disbursement of funds to educational, health, environmental and other community needs. So many Community Impact Grants have been awarded since 2008, that a typewritten list encompasses two single-spaced pages.

Examples of 2021's grant recipients demonstrate the broad range of impacts our donors' generosity has on the community at large.

- \$7,500 to ForKids for materials, supplies and transportation to enable a successful educational program for homeless students in Western Tidewater.

Continued...

2021 BOARD OF DIRECTORS

Mary C. Haddad (President)
 Harry Lee Cross, III (Vice President)
 J. Wayne Scott (Treasurer)
 Leroy Bennett (Secretary)
 Charles R. Birdsong
 George Y. Birdsong
 James E. "Jay" Butler, III
 Thomas M. Chamberlain
 John D. "Jack" Eure, Jr.
 Carl L. Farris, Jr.
 J. Leslie "Les" Hall
 Oliver Kermit Hobbs, Jr.
 David F. Host
 S. Chris Jones
 Deborah B. Russell
 Whitney G. Saunders
 Dwight C. Shaubach
 Vernon M. Towler
 Joseph N. "Joby" Webb, Jr.
 Margaret N. Wiley
 B.J. Willie

FOUNDATION STAFF

Win Winslow
 Executive Director
 wwinslow@suffolkfoundation.org

Kim Raines
 Grants Administrator

Nicole Nelson
 Administrative Assistant

President's Letter continued...

- \$10,000 to Western Tidewater Free Clinic to provide excellent and free dental care to uninsured patients.
- \$3,000 to Riddick's Folly to support historical programs and educational opportunities for the Suffolk community.

Additionally, the selection of recipients for student scholarships were, as always, considered by the Distribution Committee with great thoughtfulness. Donor Advised Funds allowed donors to have a role in specifying how their community gifts should be targeted toward the specific programs or student populations. Generous individuals considered their priorities for assisting the community and worked with our staff by advising how these funds should be dispersed.

The fact that the work of many dedicated individuals provides a strong foundation for continued philanthropy in Suffolk and Western Tidewater is a credit to the historically excellent leadership enjoyed at the Suffolk Foundation. I am the seventh President to be honored with this two-year responsibility for our community, and I look forward to reporting our 2022 successes next year. With our Board of Directors' hard work, the contributions of community-minded donors and – we hope – your participation, the Suffolk Foundation continues to be a force for good in our community.

Sincerely,

Mary C. Haddad
 President

15 YEARS OF GRANTMAKING



Total Contributions
(non-operating)



Number of
Funds



Community
Grants



Scholarships
Awarded



2021 Year-End
Assets



*Suffolk Foundation 2021 Community
Impact Grant recipients*

GRANTS

In 2021 the Suffolk Foundation granted \$160,600 to 35 nonprofit organizations working to positively impact life for the residents of Suffolk and Western Tidewater. The grants funded nonprofit work in the areas of cultural arts, humanities, education, environment, health, and human needs.

To learn how to apply for a grant, please visit suffolkfoundation.org/grants.

2021 COMMUNITY GRANTS

Airfield 4-H Conference Center	\$2,000	Suffolk Art League	\$2,700
American Red Cross of Coastal Virginia	\$5,000	Suffolk Center for Cultural Arts	\$8,000
Boys & Girls Clubs of Southeast Virginia	\$3,500	Suffolk Cheer Fund	\$2,500
Children's Hospital of The King's Daughters	\$10,000	Suffolk Christian Fellowship Center	\$3,000
Children's Hospital of The King's Daughters	\$5,000	Suffolk Education Foundation	\$1,400
Communities in Schools of Hampton Roads	\$1,000	Suffolk Family YMCA	\$5,000
Foodbank of Southeastern Virginia and the Eastern Shore	\$5,000	Suffolk Meals on Wheels	\$10,000
ForKids	\$7,500	Suffolk-Nansemond Historical Society	\$2,500
Girl Scouts of the Colonial Coast	\$5,000	Suffolk Youth Athletic Association	\$5,000
Girls on the Run Hampton Roads	\$3,000	The Genieve Shelter	\$2,500
Hospital Hospitality House of Richmond (The Doorways)	\$3,000	The Links	\$2,000
Nansemond River Preservation Alliance	\$10,000	The Salvation Army, Suffolk Corps	\$8,000
Nansemond-Suffolk Academy	\$5,000	The Up Center	\$2,500
Paul D. Camp Community College Foundation	\$4,000	Tidewater Arts Outreach	\$500
Riddick's Folly	\$3,000	Tidewater Friends of Foster Care	\$2,500
Ronald McDonald House Charities	\$2,500	United Way of South Hampton Roads	\$5,000
Senior Services of Southeastern Virginia	\$5,000	Virginia Legal Aid Society	\$5,000
		Western Tidewater Free Clinic	\$10,000
		WHRO	\$3,000

DONOR STORY

CONFIDENT PARTNERS FOR PERPETUAL GIVING

Suffolk's Les and Wanda Hall were so pleased with the Suffolk Foundation's stewardship of a scholarship fund they set up to benefit children of employees at their company, Allfirst LLC, that they have launched two other scholarship funds to be administered through the Foundation.

But it is the Allfirst Memorial Scholarship that is closest to their hearts, as it was inaugurated as a memorial to their friend—and Mr. Hall's nephew—



Because of the way the Foundation is set up, I have confidence in its sustainability, and sustainability makes giving even more worthwhile.

Les Hall, board member and scholarship donor

the late Bill Sheeley, who helped start their construction company in 2000. With an initial investment of \$25,000, the fund provides a perpetual memorial to Mr. Sheeley, and it honors his association with Allfirst by



From left, Allfirst, LLC President James Templeton, Project Manager John Inman, Rachel Inman, and Allfirst founders Les and Wanda Hall. Rachel Inman and Emma McIntyre were both awarded Allfirst Memorial Scholarships in 2021.

providing financial aid of up to \$1,000 for Allfirst employees' children attending college.

"We do it, because it's the right thing to do," Mr. Hall says. "And it matters to our employees, because it makes a difference in the lives of their children." Working through the Foundation enabled the Halls to take advantage of its fund managers' expertise and ensure that the scholarships will be available for many years to come. There were other ways they could have approached setting up scholarship grants, Mr. Hall said, "but we used the Suffolk Foundation because of the idea that this will be perpetual and the confidence the Foundation brings to do that. Because of the way the Foundation is set up, I have confidence in its sustainability, and sustainability makes giving even more worthwhile."

Continued...

Donor Story continued...

The Halls' philosophy of philanthropy makes sustainability the key to community empowerment. Contrasting "current giving" — one-time donations to even the most worthy of causes — to perpetual endowments like the Allfirst Memorial Scholarship and others administered through the Foundation, Mr. Hall said, "Current giving is like a checkbook. The Suffolk Foundation is like a savings account. As it grows, the community gets stronger because of the savings account."

Furthermore, when it comes to non-directed funds given to the Foundation, he said, there is a huge community benefit from the Suffolk Foundation's

ability to be flexible and responsive to changing situations. "The Foundation has the ability to redirect funds to meet the needs of the community at the current time." That flexibility came in particularly handy during the pandemic years, when nonprofit organizations throughout Suffolk and Southeast Virginia found themselves facing challenges nobody could have predicted.

But the Halls are especially happy knowing they CAN predict that whenever an Allfirst employee or family member heads off the college, the Foundation's careful and conscientious administration of a scholarship fund started years ago means they will do so with a little help from Les and Wanda Hall.



Suffolk Forum 2021 convened community leaders of Suffolk and Western Tidewater to discuss health care equity with world renown expert Dr. L.D. Britt, a Suffolk native and the Henry Ford Professor of Surgery and Edward J. Brickhouse Chair in Surgery at Eastern Virginia Medical School.

SCHOLARSHIPS

In 2021 the Suffolk Foundation awarded \$40,500 in scholarships to 14 recipients. The scholarships support students continuing their education at colleges, universities, trade schools, or career certification programs with funds distributed directly to their schools of attendance.

To learn more about scholarships, please visit suffolkfoundation.org/scholarships.

DONOR STORY

OTHA'S NAME WILL LIVE ON

Otha Rountree was making an impact in Suffolk long before there was a scholarship in his name. Friends of Mr. Rountree, who passed away at the age of 83, set up a scholarship in his name through the Suffolk Foundation after his death from complications related to Covid in 2020. Suffolk student Ashley Pippin was the 2021 recipient of the \$1,500 scholarship, which goes to support Suffolk residents who are pursuing degrees as either LPNs or RNs.

2021 SCHOLARSHIP FUNDS

Allfirst Memorial Scholarship

James M. Blair Memorial Scholarship

Ossie S. & Thomas F. Blair, Jr. Memorial Scholarship

Audrey B. Butler Memorial Scholarship

Col. Fred V. Cherry Scholarship

Louis & Mary Haddad Foundation Scholarship

William N. (Billy) Hill Scholarship

Howard D. Mast Memorial Scholarship

Lewis F. Morris Memorial Scholarship

Amy Phelps Art Scholarship

Otha R. Rountree Memorial Scholarship

Samaritan Internship Scholarship

Suffolk Business Women Scholarship

DiStasio Health Professions Scholarship

The Otha S. Rountree Memorial Scholarship for Nursing Education is a tribute to a man who was well-known and well-loved throughout Suffolk for his support for sports teams at Suffolk High School and, later, Nansemond River High School; for his tens of thousands of volunteer hours at Sentara Obici Hospital, where he sat at the information counter and became known as "The Hatman of Obici Hospital" for his crazy chapeaux; for his involvement at Oxford United Methodist Church and as a member of the Suffolk Lions Club; and for his friendship with the nurses who attended the former Obici Nursing School. The scholarship was founded

Continued...

Donor Story continued...

with funds remaining after his death in a trust fund to which more than 150 friends had contributed to help Mr. Rountree with expenses near the end of his life.

“Otha always found a way to plug in and be part of the action,” friend Jim Parker recalled. “He always found a way to serve.” The trust Mr. Parker, Billy Hill, and Thomas Moore set up on Mr. Rountree’s behalf was a way to serve this man who had served others so well. Upon his death, the scholarship seemed the perfect way to honor a man who had dedicated so much of his life to volunteering in the healthcare field.



The Suffolk Foundation is an organization of individuals committed to the following: engage in charitable grant making; take other actions for a broad range of charitable needs to benefit the people of the City of Suffolk, VA and the surrounding areas; facilitate and develop philanthropy.

Suffolk Foundation Mission Statement



Otha Rountree

Organizing the scholarship, with the help of Win Winslow and the Suffolk Foundation, turned out to be the perfect solution. One bonus they discovered regarding the Foundation’s stewardship of the scholarship is that the seed money that created it will benefit from the careful and responsible attention investments receive from the Foundation’s Board of Directors and staff. “And as long as the investments hold, Otha’s name will go on, in perpetuity,” Mr. Parker said.

One could say that, thanks to the Rountree Memorial Scholarship and the faithful work of the Suffolk Foundation, Otha Rountree never stopped giving of himself to benefit the healthcare community in Suffolk. He may no longer be logging volunteer hours, but his name lives on.

FINANCIAL SUMMARY

The Suffolk Foundation started in 2006 as a community asset to manage funds directed to meet community needs. Our first grant distribution in 2008 came from \$2.4 Million in assets. Today community-minded donors entrust assets to the Suffolk Foundation, knowing the community foundation stewardship will improve the community now and meet unknown needs of the future. We partner with Davenport Asset Management to wisely invest the funds entrusted to the Suffolk Foundation. Our mission is to assist individuals, corporations, organizations, and other foundations with their charitable goals in Suffolk and Western Tidewater.

AUDITED FINANCIALS

Assets	2020	2021
Cash	\$93,765	\$106,243
Cash – Restricted	\$440,830	\$538,420
Contributions Receivable	\$154,500	\$98,000
Investments	\$10,621,904	\$11,873,022
Land, buildings, equipment	\$58,864	\$54,172
Total Assets	\$11,369,863	\$12,669,857
Liabilities and Net Assets		
Total Liabilities	\$22,284	\$0
Restricted/Unrestricted Net Assets	\$11,347,579	\$12,669,857
Total Liabilities and Net Assets	\$11,369,863	\$12,669,857

WAYS TO CONTRIBUTE

The Suffolk Foundation welcomes charitable donations of any size:

- Donate Unrestricted Funds of any amount to support the impact of Community Grants.
- Become a Friend of the Suffolk Foundation with a gift of \$100 to \$1,000 towards the Operating Fund, ensuring the community foundation work is sustainable.
- Join the Women's Impact Fund for \$1,000 and engage with other philanthropic-minded women through a donor-advised giving circle.
- Create a Named Charitable Fund with a donation of \$10,000 or more and fund good work in the community forever.
- Endow a Scholarship with a donation of \$25,000 or more and encourage students in perpetuity.
- Establish a Donor-Advised Fund with a minimum gift of \$25,000 and propose distributions to your favorite charities.

There are 3 ways you can give:

- Mail a check to us directly.
- Talk to us about giving appreciated stock, IRA distributions, or other assets.
- Include Suffolk Foundation in your will, trust, or retirement plans.





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A special thanks to the staff, leaders, and supporters of the Suffolk Foundation for their work on the annual report with the help of these special contributors: Res Spears, Will Lee, Jessica Drake, Doebank Designs, and Filanthropie Consultancy.

If you received duplicates or have an address change, please email office@suffolkfoundation.org.

Suffolk Foundation is a Member of the Council on Foundations (COF) and Virginia Funders Network. Suffolk Foundation is a 501(C)(3) nonprofit organization, a publicly supported community foundation classified T31 for primary charitable activities by the Internal Revenue Service National Taxonomy of Exempt Entities.



**VIRGINIA FUNDERS
NETWORK**



**Council on
Foundations**