

Jessie Ball duPont Fund
ANNUAL REPORT

2016

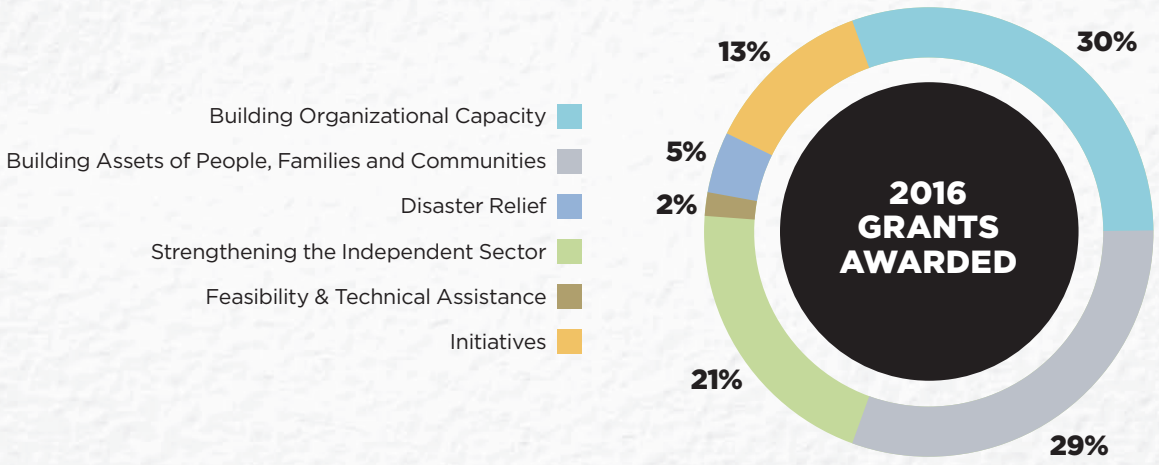
People, Organizations & Communities

JESSIE BALL
DU PONT
FUND

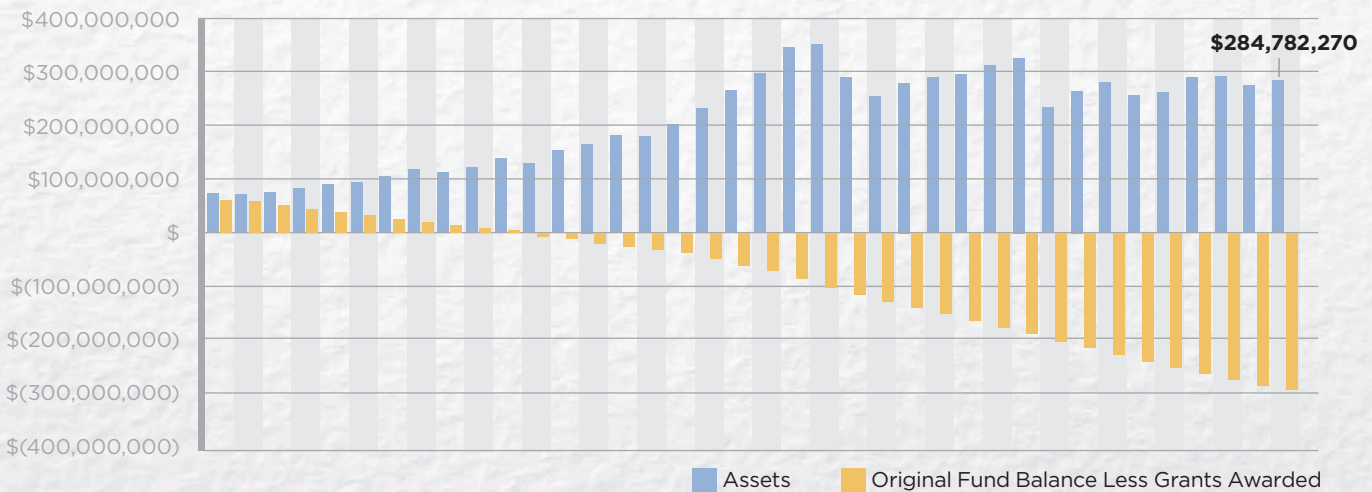


JESSIE BALL DUPONT FUND 2016

	Number of Grants	Value of Grants
BUILDING ORGANIZATIONAL CAPACITY		
General	32	\$2,394,696
Energy Conservation Initiative	9	\$434,706
STRENGTHENING THE INDEPENDENT SECTOR	10	\$1,939,189
BUILDING ASSETS OF PEOPLE, FAMILIES & COMMUNITIES		
General	23	\$2,073,020
Supporting the Safety Net	71	\$710,000
INITIATIVES		
Church Repair & Restoration	9	\$419,534
Diocesan Enrichment Fund	8	\$80,000
Executive Directors' Discretionary Fund	39	\$390,000
Small Liberal Arts Colleges' Fund	27	\$364,728
FEASIBILITY	8	\$36,580
TECHNICAL ASSISTANCE	36	\$126,846
DISASTER RELIEF	1	\$500,000
TOTAL	273	\$9,469,299



JESSIE BALL DUPONT FUND 1977-2016



Mrs. duPont established her fund to exist in perpetuity. Through careful management of its assets, the Jessie Ball duPont Fund has been able to award \$371.3 million in grants since inception, more than eight times the amount of Mrs. duPont's original gift. Without this long-term approach to asset management, the fund Mrs. duPont created would have been spent down in 1990, with no continuing support to the people, organizations and communities she cared about.

FROM THE PRESIDENT AND THE CHAIR FOR THE TRUSTEES

The will that established and governs the Jessie Ball duPont Fund was crafted by Mrs. duPont with care and consideration over 13 years from 1955 to 1968. Today, the trustees and staff of the Jessie Ball duPont Fund use similar care and consideration as they manage the assets and exercise the responsibilities of the Fund. They honor the legacy of Mrs. duPont by investing in the people, organizations and communities that were important to her.

In 2016, the results of their efforts were good, with finances remaining strong and the Fund's grants supporting exceptional work.

The Jessie Ball duPont Fund ended the year 2016 with assets of \$284,782,270 after awarding 273 grants totaling \$9,469,299 to 202 organizations. (These results are unaudited; the full audit will be posted on our website once it is completed.) Careful management of the Fund's assets has enabled the Fund to award more than \$371 million in grants over its lifetime — far in excess of the value of the Fund or Mrs. duPont's original gift.

Mrs. duPont's biographer, Richard Hewlett, writes that Mrs. duPont's philanthropy was driven by "her compassion for the less fortunate and her commitment to the value of education, religion and the arts."

The Jessie Ball duPont Fund's work today reflects ongoing respect for those values.

In 2016, almost one-third of the dollars granted by the Fund supported programs and activities that help individuals and families develop the assets they need to live full, productive lives — not just financial assets, but educational assets, health assets and cultural assets. Another 30% of awarded funds helped the grantee organizations — colleges, universities and independent schools; churches and religious organizations; and community-based nonprofits — maintain and grow their internal capacities to do their work. A smaller, but equally important portion of funds — 21% — went to help strengthen the independent sector by supporting organizations that serve the sector in various communities.

From time to time the trustees award disaster relief grants in response to natural and man-made tragedies. In 2016, the Fund contributed \$500,000 to special funds established to aid the victims of Hurricane Matthew, which struck the Southeastern coastline in October.

The Fund's work extends well beyond grantmaking. The Fund frequently convenes its grantees and other community organizations to learn about and discuss matters of common interest. The Fund actively works to educate policy makers in its core communities about the importance of affordable housing, energy conservation and the role of the nonprofit sector. And the Fund is intentional about connecting key individuals and organizations across sectors and communities to advance the well-being of the people and communities that were important to Mrs. duPont.

We are grateful for the opportunity to carry forward Mrs. duPont's legacy and privileged to have such an array of strong partners.



Sherry Magill
President

Leroy Davis
Chair for the Trustees

Jessie Ball duPont Fund's grantees are located in 31 states, from California to Maine, Florida to Oregon, and they serve their communities in myriad ways. About one quarter are churches, synagogues or other religious institutions. Another quarter are educational institutions — colleges and universities as well as independent schools. The remainder are a mix of community-based nonprofits, such as hospitals, rescue squads and museums, and large, national nonprofits such as the Girl Scouts of the USA, National Audubon Society or the National Council on Crime and Delinquency.

Mrs. duPont had a particular fondness for the communities that were “home” to her — Wilmington, Delaware; Richmond and the Northern Neck of Virginia; and Jacksonville and Port St. Joe in Florida. Today, 70 percent of the Fund's grantees are located in those three states.

The grantees located outside of those three core states are of equal importance to the Fund, and their work is often exemplary. They embody the core values of the Fund and carry forward the Fund's mission in big cities and small towns across the country. We are pleased to highlight some of these organizations in this report.

People, Organizations &



National Jewish Health

Denver, Colorado



National Jewish Health is a leader in the research and treatment of respiratory, cardiac, immune and related diseases. While the Jessie Ball duPont Fund supports many programs at National Jewish, it has invested \$550,000 with the hospital in recent years to help Colorado children with asthma, particularly those who live in rural communities, where asthma rates can be high because of poor living conditions.

National Jewish has worked closely with rural school districts to reach poor students who may live far from traditional health care facilities.

“Schools are the cornerstone of the community in rural settings,” said Dr. Lisa Cicutto, the hospital’s Director of Community Research. In regions that are plagued by high turnover among primary-care providers, “school nurses are the majority of children’s first point of contact for health concerns.”

In the San Luis Valley, more than 250 miles southwest of Denver, the hospital has worked with multiple school districts. Asthma screening is now a standard part of the annual school registration process. School nurses teach children and their families proper strategies to manage asthma and help them adopt healthy daily living practices.

National Jewish also has worked with staff at Adams State University in Alamosa, Colorado, to include asthma management and treatment in its nursing curriculum, growing a new generation of nurses in rural Colorado who appreciate and are knowledgeable about the region’s asthma challenges.

Communities



National Trust for Historic Preservation

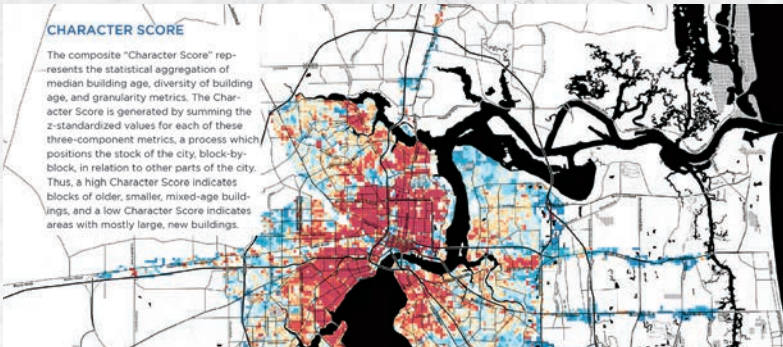
Washington, D.C.

The Osborne Association

Bronx, New York

CHARACTER SCORE

The composite "Character Score" represents the statistical aggregation of median building age, diversity of building age, and granularity metrics. The Character Score is generated by summing the z-standardized values for each of these three-component metrics, a process which positions the stock of the city, block-by-block, in relation to other parts of the city. Thus, a high Character Score indicates blocks of older, smaller, mixed-age buildings, and a low Character Score indicates areas with mostly large, new buildings.



Established in 1949 as the national organization for the acquisition and maintenance of important historical properties, the National Trust has played a pivotal role in linking America's past with its present. While much of that work has been about preservation, an equal amount has been about adaptive re-use — a focus of particular interest to the Jessie Ball duPont Fund.

The Fund developed strong ties with the National Trust in the early 1990s, when the Fund invested almost \$700,000 to support a National Trust-led revitalization of Jacksonville, Florida's Springfield neighborhood. Though Springfield boasted some of the city's best examples of late 19th and early 20th century architecture, it had fallen into disrepair and abandonment. The National Trust helped Springfield community advocates identify the underlying assets in Springfield and laid the foundation for the neighborhood's revival.

In the early 2000s, the National Trust established Preservation Green Lab, connecting historic preservation and building reuse with the growing interest in sustainability nationwide. Since 2009, the Jessie Ball duPont Fund has invested more than \$575,000 in Preservation Green Lab. In addition to advocating for the principles of reuse, Preservation Green Lab has conducted detailed analyses of non-residential properties in more than two dozen U.S. cities, now compiled in the Atlas of ReUrbanism. The Atlas allows community organizations, civic leaders and local governments to explore the potential for building reuse block by block as a means of preserving our past, making the wisest use of our resources and creating communities of character and interest.

Few groups are more marginalized than those who are in prison. Incarceration undermines relationships among spouses, parents and children and the connection of people to community. Since 1933, The Osborne Association has worked to help individuals who have been in conflict with the law transform their lives by making, mending and maintaining relationships with their families, adopting healthy lifestyles and achieving economic independence. The challenge is enormous and has grown exponentially as prison populations have swelled and economic conditions in communities have been strained.

Osborne has excelled in part because its leaders have been unflinching in self-evaluation and adapting to change. The Jessie Ball duPont Fund has been an important partner in these efforts. Since 2009, the Fund has invested more than \$515,000 in activities to help Osborne grow and maintain its capacity to do its work.

Among other things, Jessie Ball duPont Fund grants have helped The Osborne Association evaluate and upgrade technology, improve relations between board and staff, enhance public relations and advocacy work, establish new areas of work and adapt to external challenges for the organization and its clients brought about by changes in the health care landscape.



National Trust for
Historic Preservation
Save the past. Enrich the future.™

The Osborne
Association

Sisters of St. Joseph of Carondelet, St. Louis Province

St. Louis, Missouri

Agnes Scott College

Decatur, Georgia



Just south of downtown St. Louis, on the west bank of the Mississippi River, lies the neighborhood of Carondelet – rich in history but often lacking in other resources.

“It has always been a marginalized neighborhood,” said Patricia Cassens of the Sisters of St. Joseph, “but the sisters and the motherhouse have been a real anchor.”

Thirty-five years ago, one of the sisters started the Carondelet Community Betterment Federation to help the people living in the surrounding community. Many were not well-educated, Cassens said, and jobs were scarce. The Federation established a food pantry, literacy programs, a community garden, Meals-on-Wheels and a utility assistance program to help individuals and families pay utility bills.

In recent years, the Jessie Ball duPont Fund has supported the work of the sisters and the Federation with \$223,500 in grants.

The sisters “saw a real need among the people living here,” Cassens said. “They want to help people be good citizens.”

Since 2009, the Jessie Ball duPont Fund has invested almost \$4 million to help small, private colleges and universities reduce energy consumption and, thereby, lower costs. Of the 29 participating institutions, Agnes Scott has been a leader in demonstrating the potential – and power – of energy conservation.

In addition to proactively managing and reducing energy consumption, Agnes Scott has established a Center for Sustainability that manages a host of initiatives related to life on and off campus. College President Elizabeth Kiss is fully engaged in the sustainability efforts, and has secured unanimous commitment from the board of trustees. Having that strong commitment from the top “sets the stage that helps the day-to-day things flow better,” said Susan Kidd, who heads the Center for Sustainability.

The Fund’s energy conservation work is intended to help colleges understand their energy consumption, use data to drive conservation efforts and reinvest financial savings to retrofit buildings. Agnes Scott created an internal Green Revolving Loan Fund, the assets of which are spent on energy conservation projects. Savings are reinvested in another generation of projects. Agnes Scott raised \$1 million for its initial round of projects, Kidd said. The revolving loan fund has attracted new donors and inspired existing donors to make additional gifts.



CISI

Sisters of St. Joseph of Carondelet

ST. LOUIS PROVINCE



AGNES SCOTT
COLLEGE

The Jessie Ball duPont Fund works to expand access and create opportunity by investing in people, organizations and communities that were important to Jessie Ball duPont.

Across its work, the Fund organizes its resources around these focus areas:

- Building the Capacity of Eligible Organizations
- Building the Assets of People, Families and Communities
- Strengthening the Independent Sector

VALUES

Throughout their work, the trustees and staff of the Fund strive to:

- Learn with and from the people they serve.
- Respect the wisdom and creativity of the organizations and communities with whom they work.
- Engage in thoughtful and disciplined reflection about the decisions they make.
- Maintain the highest ethical standards in all that they do.
- Act with compassion, work for justice and champion the rights of all people to share in the wealth and health of our nation.

CORE BELIEFS

The trustees and staff of the Jessie Ball duPont Fund believe:

- A democratic society that works for all people requires the participation of a strong and organized independent sector.
- Communities are stronger and healthier when:
 - Public, private and philanthropic resources are invested to build the assets of individuals, families and neighborhoods;
 - Citizens, neighborhoods and organizations work together across the boundaries that divide us;
 - They are deliberate about identifying, building and using their philanthropic assets — the time, talent and money of people.
- Citizens have both the right and the responsibility to participate fully in public debate about the distribution of resources, opportunities and assets intended to serve the common good.

TRUSTEES

Leroy Davis, Chair for the Trustees
Marty Lanahan, Vice Chair
Thomas H. Jeavons
Rev. Eddie E. Jones
David Llewellyn
Mary K. Phillips

TRUSTEES EMERITUS

The Right Rev. Frank S. Cerveny,
Clerical Trustee 1998-2003
Jean W. Ludlow, Trustee 1985-2005

STAFF

Sherry Magill, President
Davena Sawyer, Executive Assistant to the President
Chris Crothers, Senior Program Officer
Katie Ensign, Senior Program Officer
Barbara Roole, Senior Program Officer
Mark Walker, Knowledge Management and Technology Officer
Denys Zayets, Knowledge Management and Technology Associate
Geana Potter, Grants Database Manager & Administrative Assistant
Marilyn Benjamin, Grants Database Manager & Administrative Assistant
Betsy Thompson, Assistant Bookkeeper/ Office Assistant
Sydney England, Fellow

**JESSIE BALL
DU PONT
FUND**

Jessie Ball duPont Fund
40 East Adams Street, Suite 300
Jacksonville, Florida 32202
P – 904.353.0890 800.252.3452
F – 904.353.3870
www.dupontfund.org