



A PART
OF THIS EARTH

THE STORY OF
THE SAPELO FOUNDATION

THOMAS BRENDLER



*I, Ben M. Fortson, Jr., Secretary of State of the
State of Georgia, do hereby certify that*

“GEORGIA AGRICULTURAL AND FORESTRY
RESEARCH FOUNDATION, INC.”

The Story of the Sapelo Foundation

A Part of This Earth

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THREE GENERATIONS OF
PROGRESSIVE FAMILY PHILANTHROPY
IN GEORGIA

Thomas Brendler

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To the people and the environment
of the state of Georgia —
the core of the Sapelo Foundation.

To the trustees and staff,
for their deep and longtime dedication
to the Sapelo Foundation.

To our partners, the grantees of the Sapelo Foundation,
for transforming the aspirations of our foundation
into firm and sustainable actions.



fig. 1 Red-winged Blackbird

Mission

The Sapelo Foundation

promotes progressive social change affecting, in particular, vulnerable populations, rural communities, and the natural environment in the state of Georgia.

Values

The Sapelo Foundation

- › Works to empower people who are powerless or marginalized.
- › Acts as a catalyst in promoting change primarily through affecting public policy.
- › Is strategic and proactive in its funding and leverages financial resources.
- › Convenes potential partners around issues.
- › Encourages collaborative action and networking, particularly among groups with differing racial, cultural, and ethnic backgrounds.
- › Takes risks in grantmaking and encourages other funders to participate.
- › Shares experiences with foundations and other potential partners.



fig. 2 Salt Grass

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In memory of
Richard J. Reynolds, Jr.
founder of the Sapelo Foundation

Foreword

Annemarie Reynolds and Irene Reynolds Schier

The idea for compiling a history of the Sapelo Foundation has been on our minds for several years. Nearly a decade ago, when Smith Bagley and Annemarie Reynolds stepped down after 28 years and 49 years on the board respectively, they effectively handed over the reins of the Foundation to a new generation. By then it had become custom for seasoned trustees and staff to tell stories about Sapelo to younger family members and new trustees. The significance of this transition, however, created a sense of urgency around the need to document and preserve the history of the Foundation for future generations—its origins and evolution, its challenges and achievements. All the intricate threads of its story.

With veteran trustee Bill Broker and longstanding Executive Director Phyllis Bowen still very much engaged in the life of the Foundation, we saw an opportunity to draw on a wealth of first-hand knowledge and experience for this important project. We also took it as an opportunity to delve into Sapelo's rich archives—a trove of minutes, reports, correspondence, press clippings, and other illuminating artifacts—to help piece together a narrative spanning more than six decades.

We believe that this comprehensive survey will be of great value to new board members, enhancing their overall understanding of the Foundation and in so doing strengthening their ability to provide leadership and guidance. We also hope that this book will provide grantees with a deeper knowledge of Sapelo and fill them with pride in seeing their accomplishments recounted in its pages—proof that they are an essential part of the Foundation's history. Finally, for longtime trustees and staff, we expect these stories will not only bring back old memories, but also invite fresh reflections about Sapelo's past, and in the process help shape its future.

Author's Preface

This book would not have been possible without the vision, generosity, and patience of Irene Reynolds Schier and Annemarie Reynolds, who recognized the value of documenting the Sapelo Foundation's rich history for present and future generations and provided me with a trove of archival materials that were invaluable in telling its story. I am also grateful to Nicole Bagley, Barbara Bowdry, Phyllis Bowen, Bill Broker, Alan MacGregor, and Ben White for their valuable insights on the manuscript as it evolved. Katharine Grant's close read brought an essential fresh set of eyes to the writing and strengthened the telling overall. In addition, every visual detail of this book is the work of book designer Lucinda Hitchcock, whose elegant and timeless design befits her subject — for this I offer her my gratitude. Finally, I would like to thank my mentor and friend Henry Carey, who introduced me to the Sapelo Foundation many years ago, and I have been greatly honored to be associated with both ever since.

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fig. 3 Cat Tails



The Story of the Sapelo Foundation

Introduction



One morning in 1948, two zoology professors from the University of Georgia were trudging through the marsh grass on Sapelo Island, one of Georgia's largest barrier islands, in hopes of finding an elusive Mexican bird, the Chacalaca. By chance they ran into the island's owner, tobacco heir R.J. "Dick" Reynolds, Jr., who had fallen in love with Sapelo's pristine natural beauty a decade earlier and made it his personal refuge. Recognizing their shared interest in the future of Sapelo Island, Reynolds invited them back to his estate for a glass of scotch. During their conversation, Reynolds learned even more about Sapelo's ecological value and its potential as a site for marine research and conservation. (Reynolds was a receptive audience for sure, but the professors were also persuasive: one of them was Eugene Odum, widely regarded as the "father" of modern ecology.)

Inspired by the conversation, in 1949 Reynolds set up a foundation that would eventually support some of the most influential salt marsh research in the world, and in later decades have a profound impact on lives and land in nearly every corner of Georgia. This is its story.

fig. 4 Chacalaca Birds





R.J. Reynolds, Jr., founder, Sapelo Foundation

Early History



No one can say with certainty when islands first emerge from the sea, nor know the precise reasons for their formation. This is, after all, part of their allure: they are silent ships moored among the currents, often within sight of mainland, but worlds unto themselves. Each tide, each storm, adds to their stories, as does the succession of people and cultures who come to stay, for a few days or for generations, drawn by force or by fortune, or by mere curiosity.

Sapelo Island's story reaches through the centuries, its layers evident in the old shell mounds, the burial grounds, the ruins of cottages and mansions, and in the old trails that now lie hidden under asphalt. And it continues, through the people who have lived there for generations—and through the efforts of those who sought to preserve its natural and cultural richness. At its heart, Sapelo's story is about the eternal delicate balance between sustainability and survival. It is about the need and desire to control nature and the necessity of living within nature's limits. And, ultimately, it is about the complex and intertwined legacies that can come to occupy a place, and about a future that is never known or certain.

At ten miles long and four miles across (16,000 acres), Sapelo Island ranks as the fourth largest of Georgia's 13 barrier islands. Reachable only by public ferry or private boat, the island hosts a range of habitats, including marsh island "hammocks," dune ridges, and old live oak forests. But it is its salt marshes that make it most unique. Georgia and South Carolina are home to 80 percent of the East Coast's salt marshes, and Sapelo is the site of one of the largest unfragmented pieces. Many scientists believe that Sapelo's is the most pristine salt marsh in the world. Salt marshes, fed by the ebb and flow of tidal currents, play a critical role in providing habitat for small organisms that form the foun-

dation of the coastline's bountiful food chain. As Eugene Odum described it:

In Georgia, the salt marshes are the biological heart of the estuary ...The inner recesses of marshes and small creeks are the seafood nursery....[T]here is a tremendous export of materials from these parts of the marsh into the deeper waters where the food energy supports a whole host of additional organisms.¹

Salt marshes have also played a valuable role by helping to trap pesticides, herbicides, and other chemicals that wash downstream in its sediments and dull their toxicity. Continued coastal development, however, has placed increased strain on estuarine systems.

The earliest evidence of human settlement on Sapelo Island dates back 10,000 to 20,000 years. The most visible traces of these early Native American inhabitants are shell mounds, some of which can still be found on the north end of the island today. Many more are believed to have existed, but were used over the last 300 years to build the "tabby"² houses and to surface the handful of paved roads that crisscross the island. The Guale, a Native American chiefdom thought to be a branch of the Creek, lived on Sapelo and the surrounding islands and coast beginning as early as 1150 A.D. The island is believed to have taken its name from Sapala, a Guale village, although it is worth noting that early nautical charts also refer to the island as "Guale Island."

In the mid 1500s, the Spanish established a mission and garrison on the island, the Convent of San Jose de Zapala. ("Zapala" is presumably a transliteration of "Sapala.") The mission was one of several set up by the Spanish across Florida and along the Georgia coast. The Spanish mission system was dismantled by the English by 1684, and the Colony of Georgia was founded roughly 50 years later. Sapelo Island was bought and sold several times throughout the remainder of the 1700s, most notably by the Marquis of Montalet, who built Chatelet (commonly referred to as "Chocolate"), a mansion on the north end of the island whose ruins are still visible.

Sapelo's French and English owners during the 1700s—most of them speculators, traders, or planters—are credited with the dubious distinction of bringing slaves to the island from West Africa (primarily Sierra Leone) to work the first plantations. These African people brought with them expertise in cultivating rice, a profitable and much-desired crop introduced on the southeast coast at the time. African slaves continued to work the land under the island's succession of European owners, and Sapelo's several hundred residents today are almost entirely their descendants.

Slaves brought to the southeastern U.S. coast formed the Gullah culture (whose name comes from "Gola," a West African ethnic group). Gullah is a hybrid culture of sorts, drawing on traditions from many West African cultures. Geechee, the Gullah language, is a distinct dialect with roots in several African languages. Gullah culture endures: there have been numerous efforts to preserve it, and it also drew national attention in 1991 with the acclaimed film *Daughters of the Dust*.

In 1802 Thomas Spalding, a prominent politician and self-styled Jeffersonian renaissance man, purchased 4,000 acres on Sapelo. He continued to acquire land through the years, and by the time of his death in 1851, he owned nearly the entire island. Spalding was an industrious planter and is remembered today as the father of the Georgia sugar industry. Among his innovations developed on Sapelo was a tidal-powered sugar mill, the first of its kind in Georgia. He was also one of the pioneers of "long staple" Sea Island cotton. Other enterprises included cattle, which were sold to ships waylaid at the coastal ports, rice cultivation, and timbering operations. Although his great-grandfather was an outspoken abolitionist, for these pursuits Spalding himself relied on slaves—more than 200 in all.

Spalding built the grand South End House, reportedly modeled after Thomas Jefferson's Monticello, which would also serve as the residence of Sapelo's future owners.

When the Civil War began, across the southeast coast many plantation owners feared a naval invasion by the union and fled,

leaving their land fallow and their houses to ruin. In many cases the fears proved to be founded, as union troops occupied plantation houses on Sapelo and elsewhere.

By the time of the Civil War, there were at least three slave settlements on the island. Most notable among these was Hog Hammock, named for Spalding slave Sampson Hogg, which was established in 1834 by direct descendants of Spalding's first slaves.

Immediately following the Civil War, freedmen arrived to settle on Sapelo, initially heartened by Sherman's Special Field Orders No. 15, which set aside land for settlement by freed slaves. But when President Johnson rescinded the decree, all but Spalding's original slaves were allowed to stay. In 1872, three freedmen, William Hillery, John Grovner, and Bilali Bell, negotiated the purchase of just over 600 acres (the only land that didn't belong to Spalding), which they then parceled into individual tracts and sold to other Island residents. This land became the village of Raccoon Bluff. In the coming years, freed slaves purchased additional land in other settlements: Lumber Landing, Belle Marsh, Hanging Bull, and Shell Hammock.

In 1870, Spalding's heirs attempted unsuccessfully to restart plantation operations, but did manage to continue residing on the island, raising free-range cattle. For their part, freedmen on Sapelo lived a largely subsistence existence until the early 1900s.

Howard Coffin, Vice President of Detroit-based Hudson Motor Car Company and founder of National Air Transport Company (which would later become United Airlines), fell in love with Sapelo Island while visiting on a deer hunt in 1911. He purchased most of the island from Spalding's heirs the next year and eventually acquired all but Hog Hammock, Shell Hammock, and Raccoon Bluff, settlements home at the time to 300 descendants of former African slaves. In pursuit of an ideal hunting preserve, Coffin (and Reynolds, Sapelo's subsequent owner) attempted over the years to consolidate these settlements through land swaps and direct purchase. Reynolds' moves stemmed from a recognition that the people of Raccoon

Bluff had no passable roads or access to the island's docks—and children were not able to attend school regularly. By 1964, all settlements except Raccoon Bluff had been bought out.

Like Spalding before him, Coffin was industrious: he envisioned Sapelo as an empire of sorts and initiated a variety of projects intended to make the island self-sufficient, even profitable. He planted cotton and corn, ran cattle, and fished for shrimp and oysters with a 27-boat fleet; he even farmed diamondback terrapins. He drained swamps and dug duck ponds, and bred pheasants and turkeys for hunting. (Interestingly, it was government research projects Coffin sponsored that led to the introduction of the Guatemaltecan chacalaca—the bird that would later draw Eugene Odum and his colleagues to Sapelo and their propitious encounter with Reynolds.) He entertained luminaries including Presidents Hoover and Coolidge and Charles Lindbergh and designed the 124-foot luxury yacht *Zapala*.

Coffin invested in the development of neighboring Sea Island and St. Simons Island. He brought in his young cousin Alfred B. “Bill” Jones (who would later become a trustee of the Sapelo Foundation) to help manage his growing holdings. Together they formed the Sea Island Company, which built the renowned Cloister Resort on Sea Island, and Jones soon became primarily responsible for managing Coffin's business dealings.

In 1934, Coffin invited R.J. “Dick” Reynolds, Jr., then 28, to join him on a hunting trip on Sapelo, reportedly to interest him in investing in his Sea Island Hotel. Reynolds was taken with Sapelo's pristine beauty. Even at that time, the Sea Islands were in being developed rapidly as vacation destinations for wealthy families, among them the Carnegies, Vanderbilts, and Rockefellers. (Sapelo had, in fact, recently been profiled in *National Geographic*.³)

With the Great Depression in full swing, Coffin found himself overextended and needing to scale back on his investments. He agreed to sell Sapelo Island, along with all of the buildings and *Zapala*, to Reynolds for \$750,000—well below what he had paid. Only the African-American settlements, which Coffin had never owned, were not part of the sale.

Reynolds completely renovated the main house, most notably

commissioning renowned artist Athos Menaboni to paint elaborate murals that have remained to this day. He also dismantled and rebuilt many structures created by Coffin. Yet, he continued many of Coffin's agricultural projects, including timbering and sawmilling operations, and running Guernsey cattle for dairy production. As with Coffin's efforts, these endeavors served to employ numerous island residents and draw income from the mainland. For a brief period in the 1940s, Reynolds also tried his hand at an exclusive retreat, Sapelo Plantation Inn, but the locale proved too remote and tranquil for the tastes of the day. Around that same time, he also ran a summer camp for underprivileged youth.

Birth of the Foundation and the Marine Institute



From his very first visit, Reynolds was entranced by Sapelo Island and committed to conserving its natural wealth and unique character. "He loved the island more than any place he ever had in his adult life, and at the same time he worried about its future and the preservation of its beauty," his fourth wife and widow, Anne-marie Reynolds, reflected in 1984.⁴ Thanks to Dick and Annemarie's early efforts, Sapelo Island did not follow the same path as its neighbors like Tybee Island, Hilton Head, and St. Simon's. The couple set in motion a decades-long campaign that has protected the entire island from development through a combination of outright state and federal ownership, and conservation easements. Sapelo Island is home to some 100 inhabitants, among them researchers and descendants of African slaves, many of whom own local businesses. In fact, Sapelo Island is the only one of the Georgia barrier islands with a resident African-American population. Sapelo is also the site of valuable ongoing ecological research and an ever-popular destination for tourists seeking an unparalleled natural and cultural experience.

Driven by his passion for the island, and prompted at least in part by his encounter on the beach with the eminent ecologists the previous year, in 1949 Reynolds applied to the Superior Court of McIntosh County for a charter to establish "a private, charitable and non profit corporation to be named Georgia Agricultural and Forestry Research Foundation." Joining him on the application were the Honorable F.M. Scarlett and A.M. Harris of the First National Bank of Brunswick (Georgia), which would become the Foundation's corporate trustee. The Foundation's stated business was "the promotion of agricultural and forestry research in the State of Georgia and elsewhere, and carrying on of any charitable

activity of any kind and in any place.” On December 16th, 1949, a 35-year charter was granted.

Little documentation exists about the Foundation’s first decade. Most likely Reynolds engaged through the new foundation in a variety of agricultural experiments, none which led to any substantive result.⁵ Ongoing conversations with UGA President O.C. Aderhold, Odum and his colleagues, and the University of Georgia’s Board of Regents, led to Reynolds’ invitation to UGA to establish a partnership for the purposes of environmental research. Recognizing that Georgia at that time had no center for ocean research, the Regents proposed a Marine Biological Laboratory on Sapelo Island. (The roots of Reynolds’ interest in such a venture may also lie with his service in the Navy in World War II and with his lifelong passion for the sea.)

The Laboratory—which would later become the University of Georgia Marine Institute (UGAMI)—was formally established in 1953, with the Foundation as its principal donor. The Foundation provided the physical resources “to pursue basic research on biological productivity and related phenomena in the coastal waters and the marshes of the region,”⁶ a complex of buildings that included a dairy barn and cow sheds that were converted into lab spaces and a number of dormitories separated by a corral. The barn’s second floor, which Reynolds had originally built as a 100-seat movie theater, was renovated to serve as a lecture hall.

The Foundation also provided a research vessel and smaller boats, jeeps and trucks, and radio equipment for the use of faculty and researchers who came to live at the facility. For his part, Reynolds was reportedly less interested in the details of scientific research than in the Institute’s broader success and in the development and expansion of its facilities. Overall he was deeply invested in the Institute. In the words of former UGA Professor Larry Pomeroy, who worked at UGAMI for nearly 30 years,

Early on, he very subtly made us aware that his motto was “my way or the highway”—that he expected us to demonstrate some success at whatever we chose to do on his island, and that he would be watching.⁷

Sensing the growing potential of the partnership with the University, in August 1959 Reynolds changed the Foundation’s name to the Sapelo Island Research Foundation. He donated the structures being used by the Institute to the Foundation “so it would have facilities for continuing research work in marine biology and other subjects.”⁸ Marking the occasion, Reynolds commented, “Research work has contributed much in the past and [will] continue to do so in the future for the betterment of mankind.” At a subsequent meeting, he added that “present and future facilities on Sapelo Island have much to offer in the advancement of scientific research.”

July 1961 marked the signing of the first formal agreement between the Foundation and the University of Georgia. The six-year agreement established a “Research Fund” that provided \$110,000 annually to support scientific research operations. A “Service Fund,” whose amount was determined annually, provided funding for utilities, roads, vehicles, and facilities.

The Marine Institute and Its Legacy



The Foundation was not only instrumental in the founding of the Marine Institute, but a critical and influential supporter for several decades. Today UGAMI is known around the world as a center of indispensable, high-quality research on salt marsh ecosystems. Over the years, the Institute has delved deeply into a range of scientific topics, including the complex interactions of watershed-marsh-coastal ocean complexes, the flow of energy, nutrients and minerals, and the role of microbial processes through the land-sea interface.⁹ Not surprisingly perhaps, some scientists have even gone so far as to refer to it as the birthplace of salt marsh ecology.

One of the Institute's first major accomplishments was organizing the 1958 Salt Marsh Conference, the first of its kind anywhere in the world.¹⁰ The event attracted researchers from countries around the globe, among them Germany, New Zealand, and the Netherlands. And true to the holistic nature of ecology, which itself was in its infancy at that time, the conference brought together scientists from a wide range of disciplines including geology, botany, and ichthyology, most (if not all) of whom had never worked with scientists outside of their respective fields. Widely recognized as a seminal event in the evolution of the field, the Salt Marsh Conference also helped legitimize salt marshes as a topic of study for generations of ecologists who would follow in their footsteps and made the case for looking at natural habitats as whole systems, from multiple scientific perspectives—one of the core tenets of ecology. As participant Alfred Redfield wrote in the introduction to the conference's proceedings:

I think that what we may hope to accomplish at this meeting is to advance the recognition of salt marshes as a coherent subject for general scientific study, and to make it clear to one another

what each discipline can contribute to an understanding of the phenomena as a whole.¹¹

Interestingly, even though the Marine Institute was only six years old at the time of the Salt Marsh Conference, it had already earned itself a worldwide reputation. All of its researchers had succeeded in obtaining grants from the National Science Foundation and were collectively publishing an average of ten scientific papers per year—a trend that continued well into the next decade and beyond.

One key to the Marine Institute's success was its setting: the relatively undeveloped tidal ecosystems of Sapelo made it ideal for ecological research—"a Camelot situation for marsh scientists," in the words of UGAMI research scientist Ron Kneib. He added, "Without a place like Sapelo, society has no baseline measurement."¹²

In the decades that followed, the Institute's influence only continued to grow. In 1964, the Foundation co-sponsored a Conference on Estuaries, which was held on Jekyll Island. The gathering resulted in the book *Estuaries*, which continues to be considered a classic in the field. And just a few years later, the Marine Institute research served as the basis for conservationists' case for protecting Georgia's coastline at the 1968 Conference on the Future of Marshlands and Sea Islands, organized in response to a proposed strip-mining venture. The conference set the stage for the historic 1970 Marshland Protection Act, at its time the strongest of its kind. Though limited to Georgia's coastal habitats, the Act has since served as a model for conservation legislation around the world.

In 1979 the Marine Institute became its own line item in the Georgia budget and a decade later earned recognition from the National Sea Grant College for its contribution to marine research. Today, UGAMI is credited with over 1,000 peer-reviewed research papers in the field of salt marsh ecology. Although Skidaway has in recent years become the locus of marine research in the region, as one of the oldest marine laboratories in the country, the Marine Institute's studies provide a priceless long-range reference point.

At the same time, Sapelo's protected marshes serve as an ecological benchmark for salt marshes around the world. The Foundation's critical role over the years is widely noted, earning it the following dedication in L.R. Pomeroy and R.H. Wigert's *The Ecology of the Salt Marsh*: "With our appreciation that Mr. Reynolds provided the impetus for all of this, and our gratitude for your continuing support of the research at Sapelo."

The Marine Institute's legacy is well summed up by Jim Alberts, its director from 1984–2001:

The fact that so many scientists conducted studies there is a testament to its importance. One can travel the world and wherever there are researchers who study marshes, they are aware of Sapelo Island and the pioneering and continuing knowledge gains that are the legacy of the researchers who have been there.¹³

In 2003, UGAMI celebrated its 50th anniversary. A few Foundation trustees, including Annemarie Reynolds, joined the festivities, which featured a tour of the islands and a series of lectures about marine science by leading oceanographers and marine biologists.

Sapelo Island Research Foundation: The Early Years



Driven in large part by the partnership with the University, the Foundation's operations grew significantly over the next few years. Between 1959 and 1962, no formal meetings were held, but it was an extremely busy time for the Foundation as Reynolds diligently transferred more land—nearly the entire southern end of Sapelo Island—into the hands of the Foundation. Challenged by the growing burden of managing day-to-day operations, in a May 1962 meeting it was resolved that "the Foundation needed a qualified scientist to act as coordinator of research on the island."¹⁴ The Foundation hired Dr. George H. Lauff, a retired professor from Michigan State University, to head the Marine Institute and invited him to join the board. It was also around this time that the Laboratory's name changed to the Sapelo Island Research Laboratory.

Activity at the Laboratory increased rapidly, as did its expenses. Grants from the National Science Foundation and the Atomic Energy Commission helped finance research, but the costs of maintenance kept rising. Reynolds wrote in 1963, "Sapelo, of course, is a constant worry and I am still at a loss as to what is best regarding its future . . . Sapelo under the circumstances presents a great problem to me." Lauff evidently felt similarly, and in 1964 resigned from the Laboratory and the Foundation's board, returning to Michigan to spearhead MSU's W.K. Kellogg Biological Station.

With the Foundation and the Laboratory facing enormous and mounting challenges, Reynolds participated in his last board meeting in November 1964, succumbing to emphysema the very next month. Both institutions owed their very existence to Reynolds' vision and commitment, and his sudden absence at such a critical time brought the very fate of Sapelo Island into question.

With neighboring islands under rapid development, Sapelo's arcadian character was more alluring than ever.

Three trustees remained involved in the Foundation, including Annemarie Reynolds, who took on the job of Foundation President in 1965. This was a sudden and unexpected role, coming at a critical and challenging time in the history of the Foundation. With characteristic understatement she later reflected: "At the time I was not aware of the difficulties and implications . . . but you get confronted with it and it's a learning process."¹⁵

Annemarie Reynolds inherited all of Dick Reynolds' land holdings on Sapelo Island. Initially, she contemplated incorporating these tracts—nearly the entire remainder of the island—into the Foundation's holdings. However after careful consideration she soon abandoned this idea. In order to honor her late husband's legacy, she felt compelled to do whatever she could to ensure that the island remained in a "natural state." The Foundation was already struggling under its own weight, barely able to cover the expenses of operating the Institute—expenses that were growing precipitously with every passing year. Transferring her holdings to the Foundation, she felt, would place an untenable burden on the Foundation and risk forcing it to cut timber or even sell prime parcels just to sustain its day-to-day operations. In the long run, doing so would doom both the Foundation and the island. As she summed up nearly twenty years later: "A foundation should have a future and an obligation to the donor. [The Foundation] was already spending more than its income."¹⁶

Jewel Among Rocks: Protecting Sapelo Island Forever



The Marine Institute continued to operate in the wake of Dick Reynolds' death, and in 1966, the Foundation and UGA signed a second agreement to continue its work. The arrangement provided funding at a level of \$95,000 annually for ten years.

At around this time, Richard Tift, a member of the Georgia Game and Fish Commission,¹⁷ approached the Commission's director, George Bagby, with the idea of having the state of Georgia purchase land on Sapelo for the purpose of protecting it in perpetuity. Together they recruited Georgia Governor Lester Maddox to present a written offer to Annemarie Reynolds, and they themselves followed up with a personal visit at her home in Switzerland.

Their approach could not have come at a more opportune time, as Reynolds had ruled out transferring the land into the hands of the Foundation, and as such was still struggling with how to protect it from development. Her sense was that the state of Georgia had the resources and capacity to take on such an enormous financial and logistical responsibility.

Reynolds initially agreed to sell her remaining holdings for \$1 million, on the condition that both the Foundation and UGA could continue to use the land as they had been. In June 1968, she presented her proposal to the Foundation's two other trustees, A.M. Harris and Ledyard Staples. Initially they greeted it with lukewarm, resigned approval, but soon after the meeting initiated litigation to prevent the sale—driven by an abiding hope and interest that the Foundation might someday come into possession of the land. In the wake of this costly, unseemly, and quite public conflict, the trustees convened a special meeting in which they restructured the board to comprise eight people, each with a term of five years. A notable addition to the board at this time was Nancy Reynolds,

Dick Reynolds' younger sister, who would become an influential trustee over the next two decades.

The lawsuits were finally settled a year later, but not without months of bitter disagreements and great financial cost to all involved. In June 1969, the state of Georgia purchased 12,935 acres—nearly the entirety of the island—for \$835,000. In keeping with the initial agreement, the Foundation and the Institute were to retain continued access to the entire island. (The Institute's facilities accounted for the majority of the Foundation's remaining acreage.)

Although quite a sum at the time, this figure represented a fraction of what the island could have sold for on the open market—and far below offers Annemarie Reynolds reportedly received from commercial developers. The transaction marked the establishment of the Richard J. Reynolds Wildlife Refuge. The official dedication ceremony took place in November 1969, drawing statewide attention. It was attended by Governor Maddox and some 250 guests and included an unveiling of a granite monument with a bronze plaque honoring Dick Reynolds. In his speech, the governor remarked:

Mrs. Reynolds consented to make this financial sacrifice and sell this island to Georgia because of her strong interest in conserving for future generations a part of this earth in its natural condition ... [The] marshlands on Sapelo are about the only areas of this type left in the country that are ... pollution free and in a virgin state. In this respect, Sapelo is a jewel among the rocks.¹⁸

Echoing this sentiment, C. Edward Carlson, regional director of the U.S. Department of the Interior's Bureau of Sport Fisheries and Wildlife, added:

...we rightly commend Annemarie Reynolds for her generosity, but future generations will memorialize her for the depth of her understanding and foresightedness about the need for action on environmental matters.¹⁹

When it was her time to speak, Annemarie Reynolds stated simply and eloquently, "It is the fulfillment of my husband's wishes."

The conservation of Sapelo opened the door for the sale of other coastal islands to the state, Cumberland and Ossabaw among them. Interestingly, all of these islands were at the time in the hands of women.

Shortly after the celebrations on Sapelo, the newly reconstituted board met in Atlanta, its first official gathering. Joining the board at this time were Alfred W. Jones, Sr. and noted naturalist Dr. Richard Pough.

Meetings followed annually thereafter, focusing on an ever-growing docket of business. For these events, the board gathered in Greenwich, Connecticut, home to Nancy Reynolds, at Musgrove Plantation on St. Simon's Island, or at the main house on Sapelo. Musgrove, a large family estate built in the 1940s by Nancy Reynolds, was an ideal site for board meetings and more accessible than Sapelo Island. Over the years it was used by President Jimmy Carter, King Hussein of Jordan, and other dignitaries as a secluded retreat venue. Musgrove was later inherited by Nancy's son Smith Bagley and remains in his family today.

With the land sale behind it, the board delved into the countless details associated with transferring ownership and management of such a significant amount of property. And with a staff of 17—nearly all of whom were involved in the management and maintenance of property and facilities—the Foundation was in many respects even more consumed by burdens of day-to-day operations than before the sale. (The Foundation, for example, was in charge of mail delivery on the island.) The rising costs associated with the Institute only added to this impression and fueled recurring discussions among board members about the possibility of selling Reynolds' remaining holdings. Many board members felt that financial pressures would eventually force the Foundation to make decisions that were not in the best interest of Sapelo Island—and the Foundation's mission. Still others pointed to the need for the Marine Institute to remain competitive with a fast-emerging rival, the Skidaway Institute of Oceanography,

located just up the coast. (In an interesting twist, in 2013 Skidaway merged with the University of Georgia.)

During this period, trustees were also kept busy with land sale negotiations with residents of Hog Hammock—landowners who were interested in moving off island, or who were moving into Hog Hammock as part of the legacy of Dick Reynolds’ effort to consolidate Sapelo’s African-American settlements. At the same time, the board was presented with a lawsuit by attorneys for Dick Reynolds’ third wife, challenging ownership of the so-called “Lighthouse Tract” on the southernmost tip of Sapelo Island. The suit was finally settled in 1976 with an offer of \$60,000 from the state of Georgia.

For all these reasons, in July 1971 the Foundation took the first step toward unburdening itself of its holdings on Sapelo with a resolution to enter into negotiations with UGA to transfer ownership of its buildings, equipment, and land. This move, everyone agreed, would also strengthen its partnership with UGA because the University’s administration had begun raising questions about the Marine Institute’s budget for maintenance of property it did not own. Two years later, the Foundation entered into a third contract with UGA’s Board of Regents, in which it agreed to support UGAMI at a level of \$175,000 annually.

As part of this broader effort, the Foundation around the same time also entered into several additional lease agreements with the Georgia Department of Natural Resources. Together with its transformed partnership with UGA, these arrangements nearly eliminated the Foundation’s administrative and operational responsibilities on the island. This shift enabled the Foundation in 1973 (with assistance from Dr. Edward Chin, UGA’s School of Marine Programs) to formally change its status from an operating foundation to a non-operating, or grantmaking, foundation.

At the same time, trustees began approaching a number of potential buyers for the Foundation’s remaining land holdings, among them the Nature Conservancy, the University of Georgia, and the state of Georgia. In the end, Georgia’s Department of Natural Resources (DNR) emerged as the best option—in part because such a move would open up the opportunity of Sapelo

becoming a National Estuarine Sanctuary under the provisions of the 1972 Coastal Management Act.

Negotiations soon began in earnest, accompanied by required inventories, assessments, and the sale of some of the Foundation’s assets on the island—most notably the Atlas Telephone Company, a small telephone company that originally belonged to the Dick Reynolds estate. (The Foundation purchased Atlas in 1966, but sold it seven years later.) After nearly four years, the state of Georgia made an offer of \$4 million for the entirety of the Foundation’s remaining 4,200 acres, which represented the remainder of the island save the 400 acres of Hog Hammock. A portion of the purchased land was to be leased back to UGA for operation of the Marine Institute’s facilities. Roughly half the funds came from the state, while the other half came in the form of matching funds from the National Oceanographic and Atmospheric Administration, which had identified the south end of Sapelo as an ideal conservation site.

Concerned that the successive land sales signaled the Foundation’s wholesale departure from the island, residents of Hog Hammock in 1975 formed a community foundation.

McIntosh County also voiced concerns, primarily about predicted losses in tax revenue; in response, the Coastal Plains Regional Commission commissioned a \$40,000 study of potential for developing tourist-related facilities in the area. Another long-standing concern had been land loss and the associated erosion of Gullah culture and language, largely due to Sapelo’s “discovery” by developers and land speculators. (As recently as 2008, for example, \$200,000 would buy less than an acre.)²⁰ In an effort to address this issue, Congress in 2006 designated most of the southeast United States’ coast the Gullah/Geechee National Heritage Corridor.²¹ For its part, the state of Georgia created a Sapelo Island Heritage Authority, but it has never been funded.²²

In November 1975, the Foundation’s board approved the sale of its remaining holdings—though not unanimously—and in December of the following year joined newly elected Governor George Busbee and other dignitaries at the Georgia State Capitol for the closing ceremony. NOAA Assistant Administrator for

Coastal Zone Management Robert Knecht hailed the new Sapelo Island National Estuarine Sanctuary as “a Christmas gift to the people of the nation from the state of Georgia, [the Foundation], and NOAA . . . a permanently protected and unspoiled area, a natural laboratory for scientific research and education.”²³

The Sanctuary became the first of its kind on the Southeast coast of the United States. And, in an apparent acknowledgment of the significance of Hog Hammock and the wariness of its residents, the governor stated: “The well-being of this community is important to the state, and the rights of its citizens will be fully protected.”²⁴

A Great Responsibility



Relieved of the obligations of owning and managing land, facilities, and infrastructure, the Foundation was now free to envision a new role for itself, made possible by the proceeds from the sale of its land holdings.

Establishing a Scholarship Program

The board’s first initiative was the Scholarship Program for McIntosh County (originally named the Richard J. Reynolds Scholarship Program). Established in 1977, the program continues to be a centerpiece of the Foundation’s programs to this day, accounting for roughly 10 percent of its grant budget. (When Annemarie stepped down from the board many years later, the program was renamed the Richard J. and Annemarie Reynolds Scholarship Program.) The program was originally developed out of a sense of commitment to increasing opportunities for the people of Sapelo and coastal Georgia, and to compensate McIntosh County for tax revenue lost when it sold its land to the state.

Although the program encountered challenges early on, over the years it has made a difference in the lives of hundreds of students, among them one who went on to attend law school and become an assistant county attorney, and many more who returned to McIntosh County to teach. The scholarship program was initially designed for students from Sapelo Island attending McIntosh County Academy, but within a few years the Foundation extended it to Academy students from across the county.

One of the biggest challenges the scholarship program faced was limited interest in attending college: at the time, high school graduates tended to enter the workforce straight away. In response, Bill Broker, a Savannah civil rights lawyer, who was elected as a

trustee in 1985 and is a dedicated board member to this day, began meeting with guidance counselors to provide background on the program and do whatever it could to make sure students were aware of the opportunity. Although the Foundation's overtures yielded some new applicants, on balance the effort was met with suspicion by school officials. At one point, Sapelo even offered (without success) to cover the costs of an additional guidance counselor. In the end, the Foundation took matters into its own hands, with Broker over the next ten years making regular presentations at McIntosh Academy about the scholarship program and then arranging individual meetings with applicants in his Savannah office. As the program grew so did its requisite paperwork, and by the mid-1990s the Foundation's staff took over responsibility for handling day-to-day management.

At the program's inception, scholarships were exclusively intended to enable students to attend nearby Brunswick Junior College. To expand opportunities for students, after a few years the Foundation eased this restriction, allowing students to apply scholarship awards to colleges of their own choosing. But here, too, a significant challenge remained: most students who enrolled in college preferred to stay close to home, where, unfortunately higher education options were severely limited.

Over the years, the Foundation has continually wrestled with the issue of how best to structure the scholarship program. The longstanding model has been to provide a large number of small scholarships to as many students as it can. The total amount of annual scholarships has ranged between \$110,000 and \$170,000, and a typical scholarship is about \$1,500. Simply put, this approach is grounded in the belief that, in the words of one scholarship alumna, "It's really important to give everyone a chance." Advocates of this approach point out that even a small award, when guaranteed, often provides an effective incentive for students to hunt for other sources to finance their education.

The scholarship program grew significantly in the 1990s, thanks largely to the Foundation's aggressive efforts to publicize it and streamline administration. Barbara Bowdry, Sapelo's Scholarship Program Officer, continued to take steps to strengthen the

program. In 2003 and 2004, for example, the Foundation developed an improved database and a system for tracking student performance and college information.

Trustees also continued to wrestle with how to build up interest in the program in McIntosh County and more broadly, increase the number of high school graduates choosing to attend college, and support them through to completion. In 2006, the Foundation established a McIntosh County school advocate project, through which it explored the option of hiring a qualified counselor to work with local children in grades 3–12, to encourage and assist them in pursuing a college education, and support them throughout the application process and beyond. A few years later, Sapelo spearheaded the creation of a Reynolds Scholars Alumni Association to help with educational needs in the county, which succeeded in enlisting a group of energized citizens. Calling themselves the Reynolds Scholars Alumni/Booster Club, the group in its first year convened two parent workshops, five math camps for students, and launched an SAT preparation class.

Today, while the scholarship program remains a relatively small part of the Foundation's overall portfolio, it endures as a clear and tangible link to Sapelo's roots. And as the nature of higher education in the United States continues to evolve—with escalating costs and expanded offerings online—it is likely the scholarship program will continue to adapt.

The Battle Over Bricks and Mortar

In 1978, three trustees (Bill Jones, Sr., Bill Jones, Jr., and James Wright) proposed that the Foundation support the construction of a Fine Arts Center on the campus of Brunswick Junior College, and formed a subcommittee to pursue the project. The trustees originally wanted to set aside \$1 million in an escrow account to fund the center, but after consultation with the Internal Revenue Service, this option was ruled out because it did not legally qualify as a donation. As an alternative, the trustees proposed a \$100,000 grant for architectural design and a matching grant to help cover the costs of construction. The matching grant requiring the College to secure donations from other sources, was approved.

Two years later, the board learned that the total cost of the Fine Arts Center was likely to be much higher than originally estimated—as much as \$5 million, but that the state of Georgia was considering issuing bonds to help raise additional funds. Some trustees expressed concern about tying up the Foundation’s resources in a potentially protracted capital project, especially when there were so many other pressing social needs Sapelo could—or should—address. In the words of Nancy Reynolds: “There is so much hardship today that it would be a crime to let these funds lay fallow. They should be put to immediate use.”

Trustees also felt a strong obligation to the communities of Sapelo Island and surrounding counties, particularly McIntosh and Glynn. Many of these communities were struggling, and so little had been done over the years in terms of financial and technical assistance that they felt there was a great need and opportunity for the Foundation to have a significant impact.

For the time being the board remained committed to supporting the Fine Arts Center, but the complexity and uncertainty of the effort spurred a broader and more involved conversation within the board about how best to invest the Foundation’s newfound resources.

At that 1980 meeting, led by then-president James O. Wright, the Foundation adopted its first giving strategy, which provided that Sapelo continue to 1) support and facilitate research in marine ecology and related fields in keeping with its original purpose; 2) fund educational, cultural, welfare, and economic development programs for the citizens of coastal Georgia and elsewhere in the state; and 3) provide educational scholarships for deserving students on Sapelo Island, especially residents of Hog Hammock. At the meeting, the board resolved to allocate half of its annual giving to marine research and half to social issues and scholarships. Some on the board, like Nancy Reynolds’ son Smith Bagley, felt Sapelo needed to make a stronger commitment to social causes. Bagley, who joined the board in 1977 and would become a key force in the evolution of the Foundation, argued—portentously—that the Foundation’s funding be applied exclusively to humanitarian purposes, as opposed to “bricks-and-mortar” projects.

Early Grantmaking Philosophy

By 1980 the Foundation was making grants to grassroots groups across the state, driven by a deep and abiding interest in both marine research and social justice. These themes would remain at the heart of Sapelo’s grantmaking throughout the decades.

One such early grant—just \$5,000—was awarded to the Appling County Community League, a grassroots organization in a small, low-income rural community between Waycross and Vidalia. Under the leadership of the charismatic Clarethia Lewis, the league worked on a variety of critical issues, including literacy, nutrition, and teen pregnancy. But perhaps most significantly the league served as a catalyst for organizing and mobilizing the entire community.

Annemarie Reynolds was always quick to point out the great responsibility that came with the Foundation’s new role: “Giving . . . implies responsibility on [the part of both grantees and the Foundation] and we should keep that in mind when we donate.”²⁵

Early on, Sapelo possessed a culture of self-reflection, with regular discussions about the scale and types of projects it was funding and the impact it was having. At several points over the years, Sapelo considered concentrating its grantmaking on a handful of specific areas as a strategy for heightening impact—and, in the process, reducing administrative costs.

Challenges

Around this time, the board took steps toward strengthening its role as a grantmaker. Only a few of the trustees—despite the best of intentions—had experience in grantmaking. So in 1981, the board reactivated the Foundation’s research committee in order to monitor and evaluate projects it was supporting. (The Foundation’s interest in understanding—and measuring—its impact continued to be a topic of great interest over the years, and remains so today.) Also, in recognition that the board still had much to learn about grantmaking strategy, trustee Nancy Reynolds called a special meeting of the board in March 1982, which featured presentations by leaders from respected foundations and other

institutions. At the meeting, trustees received guidance from Thomas Lambeth, director of the Z. Smith Reynolds Foundation (a North Carolina-based foundation created by Dick Reynolds and his siblings in honor of their brother Zachary who died tragically at 20); Don Anderson, director of the National Association of Southern Poor; Art Campbell, southwest director of the Local Initiative Support Corporation; and Fred Crawford, a professor at Emory University's Center for Research and Social Change. Also in attendance was Margery Tabankin, executive director of the Arca Foundation (established by Nancy Reynolds), who would come to play a central role at the Foundation in the coming decade.

The Fine Arts Center proposal also revealed—and intensified—growing philosophical differences within the board, chiefly between members of the Reynolds family and trustees who were not members of the family. Outnumbered on the board, the three trustees from the Reynolds family—Smith Bagley, Annemarie Reynolds, and Nancy Reynolds—had also begun to feel that they were at risk of losing control of the family foundation.

Resolution came at the June 1982 board meeting, with the election of Katharine Mountacastle (granddaughter of Dick Reynolds' sister Mary) and the reelection of Smith Bagley, restoring the family's majority. With Annemarie Reynolds as president, Nancy Reynolds as vice president, and Smith Bagley as treasurer, the newly emboldened board immediately began charting a new course. Its first order of business: canceling its resolution to support the Fine Arts Center at Brunswick Junior College.

A New Beginning



Recognizing that their vision for the Foundation required significant changes—particularly around administrative capacity—the trustees in 1983 relocated its offices to the Arca Foundation in Washington, D.C. Arca's executive director, Margery Tabankin, agreed to serve as part-time executive director.

It was a busy time for the board in other respects as well, as it embarked on a path of regular and systematic grantmaking. As Annemarie Reynolds succinctly wrote: "We want to give to the right cause, the right person, and the right project."²⁶

The board published its first annual report, and held regular meetings to review and award grants, for which it produced its first board book. Trustees also agreed to become more involved in grant recommendations by, for example, introducing proposals and reviewing all submitted proposals. Between 1983 and 1985, the Foundation awarded \$1.6 million in grants, on topics ranging from health and housing to legal services, women's issues, and environmental concerns. Reflecting on this busy chapter in Sapelo's history, Annemarie Reynolds noted:

We really have to ask ourselves whether the world is drifting apart, whether the contrasts have hardened, and the gaps between white and non-white, the educated and the unschooled, the affluent and the poor . . . have widened. The contributions our Foundation pours into [these efforts] may only be "a drop into the ocean of need," and one has the right to question if our help is useful and makes sense. The responses we have received make us believe that it is not a lost cause.²⁷

In 1983 the Foundation conducted its first site visits, a practice the continues to provide invaluable opportunities for trustees

to meet grantees personally (even longstanding ones), gain a firsthand understanding of the impact of Sapelo's work, and in the process become more skilled grantmakers. In some cases, site visits have yielded critical insights about grantees' on-the-ground operations. Visits took trustees to a range of organizations in low-income communities across the state, including the Cuyler Community Improvement Association in Savannah, the Valdosta-based Child Health Association, and the remote rural hamlet of Montezuma, home to the Concerned Citizens of Macon County Utility Project—all recipients of grants of \$5,000, the equivalent of \$12,000 today.

Underscoring the value of site visits, Annemarie Reynolds wrote: "I feel site visits are important, as it often is the only way to get a valid impression of the nature of . . . grant applications. . . . We have great responsibilities, we should be objective, we should be sensible, but above all we should be grateful that we are in a position to give and to help."^{28, 29}

Site visits were even more critical at the time considering the trustees' strong and growing interest in grassroots efforts. Over the years—and thanks in large part to the influence of Smith Bagley—site visits have become a defining element of the Foundation's organizational culture, and an instrumental source of information not only about grantmaking, but also the broader landscape of complex issues in which Sapelo operates. In an effort to expand the board's knowledge and capacity as a funder, Sapelo also initiated the practice of inviting presentations from organizations working on issues of current or potential interest.

Still, sustaining a rigorous and workable system of site visits has not been without its challenges. Many board members live outside of Georgia, making it more complicated and time-consuming to participate and stay informed. To be as effective as possible, site visits require a consistent format and sufficient preparation, which add to the demands on staff. In an effort to increase the efficiency and productivity of site visits, the board developed guidelines in 2007 and also began a practice of pre-visit briefings for trustees and tracking trustee participation in site visits.

1985 began on a sad and tragic note with the death of Nancy Reynolds, sister of Dick Reynolds, who had joined the Foundation's board 15 years earlier at a time of crisis and uncertainty. Her boundless energy and conscientiousness was instrumental in bringing Sapelo to a place of stability and strength. Trustees' tributes referenced her compassion for the people of Sapelo Island:

When it came to doing things she saw to it that they were completed, and if there was need she would do the work with her own hands . . . It was to her that the people of Sapelo turned to when they need help . . . She could have spent her life in leisure . . . but she chose not to . . . Her political knowledge, her open-mindedness in social matters, and her deep-rooted feelings for her fellow men made her an active and responsible partner in our society . . . She gave profile and a backbone to this institution and she gave what a foundation needs most—a spiritual backbone.³⁰

A Call to Action



In 1986, trustees began hearing rumors that the state of Georgia was planning a 100-room conference center on Sapelo Island, and that it was planning to scale back the Marine Institute's facilities in order to establish a state park on the south end of the island.

At the board's meeting that year on Sapelo (and its first time traveling together), J. Leonard Ledbetter, Georgia's commissioner of natural resources, outlined plans for the center, and Hog Hammock community residents expressed optimism that the center would strengthen the local economy. That same year, Ledbetter approached the Foundation for financial support for infrastructure improvements on the island. The Department of Natural Resources was also leveling the claim that the Marine Institute was not adequately maintaining its facilities and advocating that the state should end its lease to the University.

All of this news sparked profound concern on the board. The proposed center ran contrary to the spirit and intent of the Foundation's agreement with the state when it sold its holdings. Specifically, Sapelo feared that the new facility would bring a level of human activity to the island that it simply couldn't sustain and in the process render it unsuitable for scientific research as a pristine control. A state park, while perhaps more palatable to the general public—by, for example, making it more accessible—would have a similar effect on ecological research and also disqualify the island as a National Sanctuary. In addition, despite the trustees profound obligation to expand opportunities for the people of Sapelo, the island's infrastructure was now the responsibility of the state as its new owner. And lastly, the Foundation had in its possession unequivocal documentation of the University's significant investments in the Marine Institute's facilities over the years.

Taken together, these developments fueled a growing distrust of the State:

...[T]he State is losing credibility and I have serious doubts. The present administration is taking another approach and—I am sorry to say—lacks the sensitivity it needs in dealing with people, untouched land, and important international science. I have hoped there could be a peaceful coexistence between Hog Hammock, the State, and the University, but its future seems more uncertain [than] ever.³¹

One source of this distrust was that, at the time, all but one of the Foundation's trustees lived far from Georgia, and Sapelo's offices were now more than 600 miles away. Trustees had also been hearing consistent complaints from Hog Hammock residents since the land sale about the State's poor management and its lax responsiveness to their concerns.

Adding to the tension was a thread of persistent confusion and suspicion about Sapelo Island within McIntosh County. Some of this likely stemmed from the island's relative inaccessibility (even today, the island is only reachable by boat), as well as from the fact that it had always been in the hands of just one—or at most a handful—of owners.

The board decided that it needed to meet with Governor Joe Frank Harris to clarify the situation, and at the same time commissioned two research reports to better understand and forecast the impact the center would have on the island. The board's initial request was rebuffed in a crisp, vaguely-worded letter that contained no mention of the state's future plans for the island.

The board also held an evening meeting with Sapelo residents. It was very well attended, and most participants expressed support for the proposed conference center. Trustees made the Foundation's perspective known but reaffirmed its commitment to the well-being of the island's communities.

On June 15, 1987, Annemarie Reynolds and Bill Broker finally were able to meet with the governor. The meeting was

largely ceremonial, and the governor explained that the state's plans for the convention center were fluid. He also expressed his appreciation for the Foundation's funding of the Marine Institute over the years and assured them that marine research would continue on Sapelo Island. The Foundation continued to monitor rumblings about the conference center but—perhaps due in part to the trustees' vigilance and solidarity and subsequent visits to the island from prominent state legislators—in the years that followed talk of the center dissipated, and the project was never realized. Still, with so many of its neighboring islands being developed, the threat to Sapelo Island would remain a constant concern to the Foundation.

Homecoming



1988 marked a time of great change for the Foundation, beginning with a tragic loss: Jane Bagley Lehman, just 56, passed away in April. She had joined the board during the organization's critical 1983 renaissance, and her passing shocked and saddened the board. In memorializing her, Annemarie Reynolds wrote: "I admired her for many reasons, for her courage, her inspiring ideas, her openness, her devotion to worthwhile matters, and her loveliness. She was willing to cooperate, to take risks, and to venture on untrodden paths, a reliable, good comrade."³²

Soon after Jane Lehman's passing, the board and residents of Hog Hammock established a garden dedicated to her, Nancy Reynolds, and Dick Reynolds.

In July of that same year, Margery Tabankin announced that she would shortly be leaving Arca. This development, together with the crisis around the proposed conference center on Sapelo Island—which starkly demonstrated the need for a local presence—led trustees to seize the opportunity to return the Foundation's office to Georgia. It was relocated first to Atlanta and then in a 1990 effort to be closer to coastal grantees, to St. Simon's Island, near Musgrove. During this transition, in 1989, Annemarie Reynolds stepped down as president, handing the reins to Smith Bagley. At the board's behest, Reynolds remained a trustee and continued to serve as honorary chair. She continued to be an active member of the board for another two decades.

To replace Tabankin, the Foundation hired Alan McGregor, founding director (and first executive director) of the Fund for Southern Communities, a community-based foundation started a decade earlier. The first of its kind in the South, the Fund functioned essentially as a regional community foundation, pooling small donations into larger strategic grants on a wide

range of social issues across the South. In the process, the Fund also played another critical role: drawing regional and national attention to pressing issues in the region and attracting the institutions engaged in addressing them. (Many of the groups supported by the Fund were also Sapelo Foundation grantees, and MacGregor had met Smith Bagley, Katie Mountcastle, and Annemarie Reynolds in the field.)

When he joined Sapelo, MacGregor applied many of the Fund's core strategies. MacGregor felt it was essential to engage other funders (in Georgia and elsewhere), thereby increasing the investment in social and environmental work in Georgia and the broader region. This was especially helpful, he felt, for rural communities, which had been consistently overlooked by larger foundations and federal programs.

At the time, the South accounted for more than half of all rural poverty in the United States yet received only 11 percent of the nation's philanthropic assets.³³ Citing the absence of philanthropy as a critical factor in slowing change,³⁴ MacGregor pointed to North Carolina, where investment by two Reynolds family foundations, Mary Reynolds Babcock and Z. Smith Reynolds, had catalyzed a robust rural development movement a decade earlier. At his inaugural board meeting, MacGregor presented a restructuring of the Foundation's grantmaking into four areas:

1. a coastal program (including scholarships)
2. social justice
3. marine research
4. rural development partnerships.

Rural development partnerships, a new area of focus for Sapelo, would target grantmaking in areas of Georgia where people of color were beginning to gain political representation. As MacGregor described it at the time,

The program concept was to develop productive partnerships between grassroots citizen organizations and increasingly representative local political structures in rural parts of the state

with large populations of people of color. The goal was increased control by formerly disenfranchised citizens over the political and economic futures of their rural communities.³⁵

The program was anchored by the Foundation's belief that

combining the citizen power of effective community organizations with the skillful representation by dedicated public officials, the movement for political, social, and economic justice will be strengthened . . . [S]uch partnerships will . . . ameliorate the harsh conditions of rural poverty . . . [and] challenge the fundamental economic structures of their communities.³⁶

The effort grew out of a Musgrove planning conference in May 1989, which Annemarie Reynolds hailed as "a new chapter in the history of our Foundation."³⁷ A few months later, Sapelo issued an inaugural "Call for Proposals" for the program, with a stated emphasis on funding local projects. With growing regional and national interest in rural community development, thereby increasing opportunities (and demand) for investment, the timing was ideal.

For some trustees, many of whom still worried about the future of Sapelo Island and the people of Hog Hammock, the new effort offered a sign of hope. More broadly, the Foundation's reaffirmation of its commitment to both social and environmental issues—and, critically, their interconnectedness—would remain a central and defining theme in its philanthropy in the years to come. Foreseeing this, in one of her last meetings as president, Annemarie Reynolds wrote: "People and nature are dependent on each other and it is in our hands to find an acceptable balance."³⁸

In the early '90s, the Foundation awarded just over \$600,000 annually in grants, in addition to funding the scholarship program and providing ongoing operating support for the Marine Institute. Sapelo continued to make a variety of small grants, typically between \$3,000 and \$10,000, to small rural community organizations. Grants spanned a wide range of issues affecting rural African-American communities, including youth development,

affordable housing, healthcare, and cultural preservation. Grants supported many different types of activities, including education and training, organizing, cultural celebrations, and research and documentaries.

Giving during this period centered around three principal grantees: the Boggs Rural Life Center, the Center for Democratic Renewal’s Georgia Project, and the Southern Rural Development Initiative. Complemented by a range of small grants to rural grass-roots groups and a handful of “social investments,” these grantees formed the core of the Foundation’s grantmaking.

Boggs Rural Life Center

Early on, MacGregor advocated strongly for Sapelo to back the Boggs Rural Life Center as a cornerstone grantee of its fledgling rural development partnership program. Based in Keyesville, Boggs Academy had been a preparatory school for African-Americans founded in 1906 by northern Presbyterian missionaries. It had closed in 1984 and was abandoned. The church was eager to sell the property—some 1,250 acres in all—but there was strong and organized local interest in restarting it as community-based rural development center geared toward the largely African-American population. Sensing this grassroots support and seeing a potential anchor in the region for its emerging rural development work, the Foundation helped negotiate and finance the purchase of the buildings and land, and the Boggs Rural Life Center was born. (During his tenure at Sapelo, MacGregor, who championed Boggs as a “unique rural institution,”³⁹ also sat on its board.)

The Foundation initially supported Boggs with a three-year grant of \$105,000, and for the next several years it was a flagship grantee—providing technical assistance and educational programming, facilitating local and regional networking and capacity building, and serving as a demonstration site for rural development initiatives. Under the leadership of the charismatic and entrepreneurial Frank Bobrow-Williams (who would later join Sapelo’s board), Boggs grew rapidly—so rapidly that at times grants and the new programs they funded outpaced the organization’s capacity. In 1994, Boggs received federal designation as an

Empowerment Zone, which brought \$3 million for implementation from the Clinton administration.

Center for Democratic Renewal: the Georgia Project

In 1990, the trustees also saw a clear need to support efforts to combat overt racist violence across Georgia. Smith Bagley was a major proponent, believing that anti-racism work should be the overarching theme of the Foundation’s activities. Sapelo partnered with the Center for Democratic Renewal (CDR) on an initial project focused on four counties, with the hope that this work would catalyze similar efforts statewide and, eventually, create an “infrastructure” for organizing around other pressing issues.

CDR’s Georgia Project, as it was known, had an immediate impact. Concerned Citizens of Blakely, a group formed in response to claims of unequal treatment by the local fire department and supported through CDR, forced the resignation of the fire chief and two firefighters, all members of the Ku Klux Klan. The effort also led to city redistricting, which made possible the election of the city’s first African-American member of the City Council. CDR’s commitment to supporting African-American leadership development played out on a larger scale as well, for example with its creation in 1994 of the Northwest and Northeast Georgia Black Leadership Councils, coalitions of rural African-American community organizations.

The Georgia Project also represented one of the Foundation’s first attempts to build alliances between African-American and Latino communities—uniting to block Klan marches, organizing voting rights challenges, and holding a variety of leadership training sessions across the state. Since that time, Sapelo has continued to support the vision of a statewide “black-brown coalition” with mixed results, but always with a firm belief in the potential of working across cultural and racial boundaries to advance the cause of social justice.

Interestingly, CDR at this time also identified racism in Georgia’s public school system as a major issue, organizing a Musgrove conference on Race and Rural Education in 1994. This move foreshadowed the Foundation’s work on school discipline a decade later.

Southern Rural Development Initiative

Through MacGregor's past work with the Fund for Southern Communities (FSC) and his determination to increase philanthropic interest and investment in the South, he became deeply involved in the National Network of Grantmakers (NNG), an alliance focused on social and economic justice. As Sapelo's executive director, he helped establish and spearhead its Southern Funders Initiative, which provided an opportunity for foundations across the region to network, strategize, and collaborate. Specifically, the effort sought to dramatically increase the capital controlled by publicly supported, community controlled grant-making and community development lending institutions.⁴⁰ As MacGregor described it, "The initiative [would] facilitate the largest collaborative effort ever attempted among social justice organizations in the region . . . [and] significantly increase financing available for rural justice programs through sources permanently located in the South and controlled by southern activists."⁴¹

The Sapelo Foundation's high-profile engagement in NNG is a reflection of its early efforts to wrestle with an important and persistent question: what role or responsibility did it have—or should it have—in the regional and national philanthropic community?

Fueled by pressing needs, widespread interest, and optimism sparked by the Clinton administration's early and vocal support of rural development, the Southern Funders Group soon morphed into an independent organization, the Southern Rural Development Initiative. SRDI was effectively a collaboration of community-based human and economic development organizations—27 at its founding, representing 12 states and some 250,000 rural people. With the help of major grants from large foundations including Charles Stewart Mott Foundation, the Ford Foundation, and the Kellogg Foundation, SRDI grew rapidly over the ensuing years, playing an instrumental role as a powerful voice for rural communities among federal agencies and policy makers. SRDI was also critical in developing philanthropic interest in the region, and channeling these resources

to groundbreaking social and economic development projects in rural communities.

The Marine Institute

With a steep rise in grant applications during this period, trustees began to question the Foundation's annual commitment to the Marine Institute. In the context of so many pressing social and environmental needs Sapelo was learning about and attempting to address, many wondered whether such a significant amount of money could be better—or at least more equitably—spent. These sentiments are reflected in the Foundation's decision in 1993 to change its name from the Sapelo Island Research Foundation to the Sapelo Foundation.

There was also concern that some twenty years on, Sapelo was still the Marine Institute's primary funder, and that broadening its funding base would be a key factor in its long-term sustainability. At this time, the Foundation took the significant step of requiring matching funding as a condition of its annual support. A year later, the Institute succeeded, having secured a major multi-year grant from the National Science Foundation. UGAMI's efforts to broaden its funding base was also credited (by Sapelo) with forging new partnerships, notably with the Nature Conservancy regarding the Altamaha River.

McSap Development Corporation

During this period, Sapelo also continued to grapple with how best to promote and support rural development in McIntosh County. MacGregor summed up this concern in 1993, noting: "Our grantmaking in the coastal region continues to be a source of frustration. We are having a hard time finding a niche since there is really very little social activism in the region that the Foundation is most comfortable funding. The proposals that come to us are generally for traditional civic programs and services. In some cases, these programs are worthy and meet significant needs, but they lack vision and challenge."⁴²

Early on, MacGregor and the board recognized the need for a community organization that could unite residents from Sapelo

Island and McIntosh County and lead community-based economic development projects. And so McSap Development was born, a director was hired, and an office was established in Darien, the county seat. With support from the Foundation and MacGregor's personal involvement, McSap slowly ramped up a technical assistance program, and early on played a key role in mobilizing opposition among African-American communities to the siting of a medical waste incinerator.

Ultimately, McSap was hobbled by an inability to attract leadership and expertise to its ranks, and was never able to build a sustained program of activities. "McSap never could quite get things off the ground," reflected MacGregor.⁴³ Yet, he added, McSap was instrumental in engaging and supporting several young African-American leaders—in their 20s and 30s at the time—who have become influential leaders today, among them John Littles who now runs McIntosh SEED (a partnership with The Nature Conservancy), Loretta Sams who launched the Esther Project, which works with young African-American women, and Griffin Lotson who started Sam's Memorial Community Economic Development, an accomplished low-income housing group in the county. Interestingly (and perhaps not surprisingly), all three endeavors have at some point been Sapelo Foundation grantees.

Special Investment Portfolio

In addition to issuing grants, the Foundation also at this time established a Special Investment Portfolio, essentially a program of strategic, low-interest loans to "secure and progressive institutions"⁴⁴ advancing the cause of social and economic justice. In the early 1990s, social investing in the United States was still in its infancy, so Sapelo's work in this area made it "a sort of laboratory."⁴⁵ Early recipients included Elkhorn Bank, Self Help Credit Union, and Southeast Reinvestment Ventures (SERV). In 1997, Sapelo made its first investment in Georgia, to the Unified Singers Federal Credit Union.

Although the underlying concept of Special Investments was to further the Foundation's mission through an alternative strategy that would generate "good returns,"⁴⁶ in practice the results were

mixed. Some investments succeeded on their original terms, while others necessitated the negotiation of extensions and rate reductions. Not surprisingly, Special Investments became a source of board tension, championed by some trustees and questioned by others for "losing money"⁴⁷ and putting Sapelo's corpus at risk. Some board members proposed that they be replaced with ordinary grants.

In the end, Special Investments remained, representing only a small component of the Foundation's annual payout, until they were finally discontinued in May 2000. Nevertheless, the Special Investment Portfolio was recognized by the *Atlanta Journal* several years later as a "catalyst for change" in the affordable housing movement in Atlanta.

Discerning Impact: Reflections on Grantmaking

With the help of a concerted strategy, a clear vision, and strong leadership, the Foundation was fast establishing itself as a powerful philanthropic force in Georgia. As MacGregor reported about Sapelo's rural justice grantmaking in 1993: "We have targeted an issue, analyzed it in a process that included the input of our grantees, developed a strategy, and carried out that strategy in a manner that has empowered our constituents and led to impacts far beyond the effects of our funding."⁴⁸

Reflecting on this period in the Foundation's evolution, MacGregor noted that its impact was difficult to measure. "On traditional metrics, we didn't do so great. On what [our work] meant to activists, it was huge."⁴⁹

Soon after the passing in 2013 of lifelong activist Ben Coffin, a founder of the Concerned Citizens of Blakeley (and no relation to the Coffins of Sapelo Island), MacGregor started getting calls from activists with whom he had worked closely at the Sapelo Foundation, including Rosetta Johnson of the Newtown Florist Group, Foundation trustee from 1993 to 1996. They all pointed to Sapelo Foundation-funded projects as formative in shaping their lives and careers, and instrumental in building their confidence to effect social change. Echoing these sentiments, MacGregor added: "We did one of the most aggressive pushes on race and rural issues

that was done in that era; we helped a lot of rural activists who were under threat find their footing, and have good lives. The bravery and vision of the Board of Trustees allowed people to mature and grab some power in rural Georgia.”⁵⁰

The Foundation and Sapelo Island



Throughout the 1990s the Foundation continued to worry about the fate of Sapelo Island and debate the implications of its roots there. At trustee meetings, Sapelo Island was always on the agenda, and minutes reflect a significant amount of time spent discussing issues and emergent crises.

With increasing interest in the island’s relatively pristine coastal property, land speculation from “outsiders” became (and has continued to be) a worrisome issue. Fueled by demand, growing value led to increased tax assessments, making it more difficult for residents to retain ownership of their land. For its part, the state of Georgia was wary of wealthy outsiders, but for a different reason: as large, savvy landholders, they would wield more influence in any negotiations, and, in short, be more difficult to “manage.”

At the time there were voices on the board who championed the idea of the Foundation establishing a land trust. However, considering the history of land speculation and African-American landowners being swindled out of their land, the topic of land ownership was extremely sensitive. The overriding issue for residents was being able to continue their traditional uses of the land, and anything that appeared to infringe on them was viewed with sharp suspicion.

This sensitivity around land issues also limited the prospects for residents working together, especially when these attempts at collaboration were facilitated by outside groups. To assist landowners and strengthen the community, two community-based institutions had emerged during this period: Hog Hammock Community Foundation in the late 1980s and somewhat later the Sapelo Island Cultural and Revitalization Society (SICARS), both of which the Foundation supported over the years. Sapelo also helped launch the Hog Hammock Revitalization Committee (HHRC),

whose work centered around historic and cultural preservation, land retention, and economic opportunity. HHRC's core activities revolved around researching property ownership as a bulwark against speculation, working on land loss, and working to get historical recognition for African-American cultural sites. HHRC also partnered with the Marine Institute to provide a range of economic development workshops.

Residents and trustees also raised concerns about the Department of Natural Resources' cutting timber without due regard for possible negative environmental impact. There were also mounting tensions about the Marine Institute's desire to maintain the island's wildness for its incomparable research value, and Hog Hammock residents' interest in increasing tourism as a catalyst for economic development.

But perhaps the most significant topic of debate was the Foundation's remaining holdings—181 acres of land in Hog Hammock. Trustees felt a sense of responsibility to the people of Sapelo, which was partly a legacy of Dick Reynolds' original role as sole owner and manager of the island, but also driven by an appreciation for the fragility and uniqueness of the nation's last intact Gullah community. As MacGregor explained at the time: "There is simply too much history between the Foundation and the African-Americans of Sapelo for this work to be abandoned. Progress is being made . . . but needs continuing nurturing from the Foundation."⁵¹

At the same time, there was growing recognition on the board that the Foundation could not "fix Hog Hammock,"⁵² in the words of Smith Bagley, and that it needed to finally and completely cut its remaining ties. (Foundation counsel Herbert Humphrey, Smith Bagley and, later, Sapelo Foundation Executive Director Phyllis Bowen, would play instrumental roles in the eventual sale negotiations.) As Katie Mountcastle added at the time, "The Foundation cannot come up with solutions for the people."⁵³

Many trustees also felt that there was no way for Sapelo to remain supportive and impartial when it came to Hog Hammock, and that its involvement in residents' affairs, however well-intentioned, only served to muddy the waters. Instead, they argued, the

Foundation should take an approach more philosophically aligned with its grantmaking:

[With empowerment] comes the certainty that peoples' choices will not always be yours. That is part of giving up control. The people of Hog Hammock may make strategic gains and errors but must be allowed to do so for their own growth and sense of freedom. Along with financial support from foundations and technical support from organizations, they should be encouraged and allowed to play an active role in determining their own destiny.⁵⁴

Some trustees advocated for selling the property outright, proposing that the proceeds be divided into three equal portions: a new endowment for Hog Hammock, a donation to the state for future preservation, and ongoing grantmaking. The Foundation, they argued, would then be in a position to stay engaged from a safe distance while pursuing its multiple goals of supporting Hog Hammock, backing the conservation of the island, and boosting its own grantmaking. A few trustees proposed an even bolder solution: donating the land outright, most likely to the state. The Foundation was hesitant, however, to transfer land holdings to the state, considering recent experiences.

By 1997, and after much discussion, the board was in agreement that it needed "to get out of the land business," while continuing to support local efforts to stem land loss and promote cultural preservation.⁵⁵ In the same breath, trustees expressed a clear sense that local residents needed to be involved in any negotiations with the state. As Annemarie Reynolds summed it up at the time: "The Foundation [should] . . . let the state assume legal responsibilities with the land but without the Foundation giving up its interest in Sapelo Island."⁵⁶

At their May 2001 meeting, the trustees passed a resolution authorizing the sale of the Foundation's remaining holdings on Sapelo Island to the state of Georgia, with the exception of one acre—the site of SICARS' office—for \$3.5 million. Six months later, on January 16th, 2002, the Sapelo Foundation officially transferred ownership of the land to the Sapelo Island Heritage Authority, the

entity the state established expressly for the purpose of owning and conserving Sapelo Island.

At its first meeting following the sale, the board celebrated the momentousness of the sale: “This truly marks the end of one era and the beginning of another. It is as if a page is being turned and a new chapter unfolding in the history of the Foundation. This new chapter holds many opportunities for the Foundation and . . . we are eager to explore them.”⁵⁷

Even today, the sale stands out as a turning point in the Foundation’s history. To quote Executive Director Phyllis Bowen, “It was a fantastic feeling—it had been a millstone around our necks, a huge emotional struggle. It was a whole new day.”⁵⁸

Grantmaking: Issues and Challenges



Ever since the Foundation’s return to Georgia in 1983, it had been continuously learning and adapting—becoming a unique institution with a growing impact on the lives of people across the state. Throughout this process, it encountered a range of new needs and challenges, many of which it continues to wrestle with today.

In 1992, MacGregor began organizing the docket of grants to be considered by the board (commonly referred to as the “board book”) around individual issues Sapelo was attempting to address, as a way to get the board to think about its philanthropy through a strategic lens. To help the Foundation maximize its impact, a year later MacGregor also proposed that it narrow its focus to one or two strategic priorities and monitor its progress in achieving them.

With this new approach, there was also an insistence among trustees that the Foundation remain responsive to rapidly emerging issues and not be constrained by predetermined strategy. MacGregor recalls a deep, almost innate commitment to risk-taking, which he attributes to Smith Bagley and Katie Mountcastle: “There was a sense that if you saw something you should go for it—they’d want to stir things up.”⁵⁹

This culture of fearless progressiveness was complemented by a sense of encouragement, reported by Sapelo’s executive directors and attributed directly to Smith, to craft and pursue their own unique vision for the Foundation—to leave their mark, so to speak. Smith was known for having strong opinions, but also for being a tireless visionary, particularly around issues of race. “For the people” was one of his trademark mantras, one that trustees and staff fondly recall to this day. While Bagley insisted on maintaining close control over its finances, following consolidation in the early 1980s, he allowed—and encouraged—executive directors to autonomously manage and shape Foundation programs.

The dynamic tension between strategy and adaptiveness came to distinguish the Foundation's grantmaking—in very real ways this tension created structures and processes that accommodated both ends of the spectrum. Likewise, trustees became increasingly interested over the years in measuring the impact and effectiveness of the Foundation's grantmaking—something that has become commonplace among foundations today.

When it came to environmental issues, the Foundation remained uncertain about where best to engage and how strongly to advocate. The tense atmosphere of “jobs versus the environment”—in which local governments closely allied with big business and national environmental groups were not supporting work at the state level—created a complex landscape for philanthropic investment. Trustees recognized the critical need for a regional environmental strategy and for an alliance between traditional environmental activists and African-American communities. Trustees also identified air and water as issues of great importance to the Foundation's grassroots constituents that traditional advocacy groups at the time were overlooking. As an initial strategy, Sapelo opted for a similar approach to its support of the Boggs Rural Life Center and the Center for Democratic Renewal (CDR): giving “anchoring” grants to EcoAction and the Georgia Environmental Policy Initiative.

Another set of questions the Foundation faced was deceptively simple: how many grants should it give every year, for how much, and for what duration? In other words, would the mission of Sapelo be better served by a small number of large grants to “anchor” groups like Boggs and CDP? Or would it achieve great impact with a more equitable scattering of smaller grants across the state? And for any of these grants, was it necessary—or at least advisable—to support groups for more than one year, perhaps even a decade? As the trustees delved into these questions about how best to spend the Foundation's limited resources, another question arose around whether it should begin requiring a match, as it had with the Marine Institute.

During the mid-1990s, the Foundation's increased effort to be more intentional and systematic in its grantmaking yielded

to rapid growth and success. One consequence, however, was an increased demand for grants, both from emerging grassroots organizations just learning about Sapelo, and also (and especially) from grantees whose success and growth brought ever greater financial needs. Trustees struggled with the question of whether they would be able to keep pace. Was the Foundation, as MacGregor wondered at the time, becoming a “hostage of its own success?”⁶⁰ This question was particularly timely considering that the Foundation was experiencing at that point its first significant fluctuation in the value of its endowment, which reduced the annual payout by almost \$100,000. In light of these challenges, trustees wondered what Sapelo's future role would—or should—look like.

The Foundation's perpetually limited resources posed a significant challenge for another reason: it was one of only a handful of funders working on social justice issues, which meant that grantees had few places to turn for additional funds. What did this mean, then, in terms of the Foundation's obligation to its grantees?

Phyllis Bowen, Executive Director since 1997, summed up the Foundation's unique position this way: “Although the Sapelo Foundation may not be considered a large foundation in assets, it is the largest Georgia-based foundation that is committed to progressive philanthropy and social change.”⁶¹

Simply put, for many of the issues, Sapelo was the only funder in Georgia to whom organizations could turn for financial support. In hopes of attracting additional funders, the Foundation therefore pursued an aggressive role in the philanthropic community—something MacGregor saw as “a natural extension” of its reputation for innovation and its commitment to rural organizing.⁶² In 1989, for example, Sapelo hosted a meeting of the National Network of Grantmakers at Musgrove, which raised the Foundation's national profile and led to what would become the Fund for Prosperous Georgia.

The Foundation had, under MacGregor's leadership, also been active in the Southeast Council of Foundations (SECF), with the goal of increasing its visibility, identifying potential partners, and learning about grantmaking trends. MacGregor served on an SECF committee focused on expanding social justice philanthropy in the

South. In the fall of 1994 he organized an SECF conference at Musgrove entitled “The Next Generation of Philanthropy,” designed to attract resources to the region and in doing so help Sapelo grantees diversify. By the late 1990s, the Foundation was actively networking with other funders—for example the Turner Foundation and the Public Welfare Foundation—who shared its interest in the budding environmental justice movement.

This strategy continued throughout the 2000s, with Sapelo joining the Consultative Group on Biodiversity (a national network of environmental funders), founding the Georgia Rural Philanthropy Initiative, and playing an active role in the Georgia Rural Development Council. Sapelo also played a role in creating the Communities Foundation for Coastal Georgia, a local community foundation.

Over the years, the Sapelo Foundation continued to see a role for itself in advancing thinking around social and environmental issues, and striving to situate and understand its grantmaking in a broader context of issues as diverse as healthcare and rural school reform—all with the goal of attracting additional resources, and thus seeking to increase its impact. Musgrove conferences provided a key opportunity to do just that. For example, Sapelo’s Urban-Rural Summit at Musgrove in 1994 attracted delegates from 117 organizations representing 24 counties across Georgia. The event produced an endorsement for the development of a state-wide progressive activist network for political action. And in 1995, Musgrove witnessed the founding meeting of the Georgia Community-Based Development Initiative, a gathering of some 130 people from across the state.

Operations and Leadership



Staff Leadership

Alan MacGregor left Sapelo in May 1995, following his family to North Carolina where he soon became executive director of the Southern Rural Development Initiative (SRDI). In his place, the board appointed Deborah Sheppard, who had previously run the Georgia-based Campaign for a Prosperous Georgia.

Upon taking the helm, Sheppard reformulated the Foundation’s program focus areas around 1) strengthening existing organizations; 2) protecting coastal resources through environmental education, research, advocacy, and organizing; and 3) rural economic development, covering a range of issues including youth development, poultry workers, and affordable housing.

Sheppard also took several steps to strengthen Sapelo’s grant-making operations. She created the first site visit reports—detailed narratives that accompanied executive director reports, and offered insights and reflections on meetings with current and prospective grantees in the field. Preparing for the Foundation’s future, Sheppard initiated an effort to document administrative procedures in a handbook and successfully lobbied the board to establish a personnel committee and a performance review system.

Sheppard also felt that given the limited resources of so many of Sapelo’s grantees, that it could—and should—to do more to assist them than just award grants. She launched a foundation resource lending library, which contained information about other potential funding sources. Sheppard also led the creation of Sapelo’s Organizational Development Fund, which provides small grants to organizations that have received foundation grants in the past three years to participate in capacity-building trainings and workshops. Early participants reported that they would simply not have been able to attend these events without Sapelo’s support.

In response to this demand, the trustees increased the fund: by 2002 for example, it had grown to \$37,000.

Another area of emphasis for Sheppard was board development. During her tenure, the board elected its first community member since the board's turbulent reorganization in 1983, Rosetta Johnson, and had its first discussion about establishing a system for adding community members on an ongoing basis. In the years that followed, the board welcomed a succession of community members to its ranks, eventually extending their terms, allowing for reelection, and—significantly—providing the opportunity for them thereafter to be elected to regular board seats.

Sheppard advocated strongly for finding ways to engage trustees in the intervals between Board meetings and instituted an orientation program for new trustees. Orientation was helpful not only for community members joining the board, but also for younger members of the Reynolds family who were being tapped to become part of the “next generation” of family trustees.

In November 1997, the board promoted Phyllis Bowen to replace Deborah Sheppard as executive director. Bowen had joined the staff five years earlier as an administrative assistant to Alan MacGregor. She had an extensive background in environmental organizing in Georgia (for example serving as chair of the Coastal Georgia Audubon Society)—something that would prove invaluable to the Foundation's work in this area.

For example, Bowen's early backing of the Sierra Club's work on industrial hog farm permitting resulted in the strongest regulations in the country.⁶³ A few years later, she championed Foundation investments in the Georgia Conservancy and the Center for a Sustainable Coast, thus enabling these organizations to work on a state advisory council that was reviewing and proposing revisions to salt marsh regulations. At the time, the hundreds of marsh hammocks that line the Georgia and South Carolina coast were entirely unprotected under state and federal environmental regulation. In 2002, these grantees and others secured a court ruling that the state had violated the Coastal Marshland Protection

Act in approving development plans on small hammock islands outside Savannah.

Although Bowen already had a deep understanding of the Foundation, she approached her new role with fresh eyes and a desire to listen and learn. She summed up her strategy this way:

The challenge for a foundation such as Sapelo lies in finding ways to truly bring change to the social and environmental ills present in our society and not merely to continue to fund groups that respond only to the symptoms⁶⁴. . . I believe that by using common sense and creative thinking and by making tough decisions, the Foundation can continue to encourage stimulating and effectual work in Georgia that will have more impact on national policy and decision making in the long term.⁶⁵

In short, Bowen's objective at the outset was to build on Sapelo's “record of progressive philanthropy,”⁶⁶ and through some minor refinements address what she saw as a blurring of its focus in recent years. She proposed that the Foundation shift its attention away from rural community development, and focus on only two program areas: environmental protection and social justice. At the same time, she advised that Sapelo revisit the Marine Institute and explore how it could be integrated into the Foundation's environmental work, while gradually becoming self-sustaining—thereby freeing up roughly \$150,000 annually for other grantmaking.

In the end, citing what she saw as “a critical need” for Sapelo to be ever more strategic,⁶⁷ Bowen proposed organizing its grantmaking into three areas, each with a unique but dynamic set of target issues and strategic approach: environmental protection and sustainability, social and environmental justice, and rural economic development. This “program area” approach, she reasoned, would among other things enable the Foundation to become more strategic in its grantmaking, form and expand key partnerships, build the capacity of rural organizations, and bring rural issues to the state policy level. Other key questions Bowen prodded the board to ask in considering grant requests included:

How urgent is the issue? Is this the right time for the Foundation to engage? Which groups (if any) are taking leadership on this issue? Is the issue being addressed by other funders or programs?

With this new emphasis on the timing of grants, and on the importance of the broader political, organizational, and philanthropic landscape in which the Foundation was operating, Bowen was able to dramatically increase its impact.

By late 1999, the Foundation's explicit rural focus was generating new and widespread interest among rural communities. Bowen and the trustees felt the Foundation's emphasis was important, especially to counter what she saw as the "overwhelming presence of metro Atlanta [because] the Foundation was one of only a handful of groups in the South supporting rural work and often the only one in Georgia."⁶⁸

Beyond this realignment and consolidation, Bowen recognized the continued need for the Foundation to become more systematic still in its operations. She proposed highlighting the need to design and apply a set of consistent "screening criteria" and recommending the Foundation become, as she put it, "more strategic in determining funding priorities and in making grant award decisions."⁶⁹

Board Development

During this period, Smith Bagley recognized the need for the Foundation to be thinking about its future and spearheaded an effort to recruit and groom younger members of the Reynolds family to serve on the Foundation's board. First among them was Susan Lehman Carmichael, Jane's daughter (and Smith's niece), who joined the board in 1993. Annemarie Reynolds' daughter Irene Reynolds Schier took a seat on the board in 1995, and over the next decade was joined by Nancy's step-nephew Henry Carey (1998), Smith's daughter Nicole Bagley (2004), Jane's son and half brother of Susan Lehman Carmichael, Russell Long (2004), Katharine Grant (2001) and Michael Grant (2009), two of Nancy Reynolds' grandchildren, followed by Henry Carey's son Philip Cary in 2013.

In a true testament to Bagley's vision and commitment, the practice has continued in the years since he stepped down, and has

become a fixture in Sapelo's approach to board development. Indeed, it is central to the Foundation's culture.

Bagley also went out of his way to make new trustees—whether or not they were members of the Reynolds family—feel welcomed, and encouraged even the younger trustees to take on leadership roles. As Bowen recently reflected, "That's unusual in a family foundation. He did an excellent job of nurturing and grooming. Smith—and the rest of the family, through the other foundations they established—had a strong sense of gratitude and the need to give back, to volunteer your time and energy. It was not about power and control and influence—and that was unique, too."⁷⁰

In May 2005 Smith Bagley decided not to run for reelection to the board. In tribute, the trustees established a special grant award in his name, the Smith W. Bagley Advocacy Award, as a reflection of his "deep commitment to and vision for social equity."⁷¹

In the years since Smith Bagley's departure, the board has remained committed to becoming ever stronger and more effective, establishing rigorous operational policies, instituting an orientation program for new board members, and clarifying the responsibilities and expectations of trustees. For example, in 2005 there was growing concern among some trustees that board committees were not functioning as effectively as they should be—specifically, that they needed to be revitalized and that Foundation staff needed to play a more active role in coordination and communication. The result was a more adaptive committee structure, with each committee responsible for developing and reporting out a committee "work plan."

Over the next decade, Bowen and the board made several moves designed to increase Sapelo's effectiveness. These included streamlining the grantmaking process by adopting grant-management software and moving its grant application and reporting processes online. At the same time, the Foundation took steps to strengthen its analytical capacity by storing grant data online and increasing the rigor and transparency of grantee reporting. And perhaps most importantly, Bowen initiated a strategic planning process in 2000 that not only produced a critical document for

the Foundation, but established a recurring five-year planning cycle that continues to guide decision making to this day. The 2005 planning retreat was especially significant, as it articulated a set of core values and revised the Foundation's mission:

The Sapelo Foundation promotes progressive social change affecting, in particular, vulnerable populations, rural communities, and the natural environment in the state of Georgia.

As a way to support grantees beyond grantmaking, Bowen proposed that the Foundation host two to three grantee gatherings per year. The first event, entitled a "Community-Based Organization Resource Exchange Meeting" took place in March 1999, hosted by Fort Valley State University Cooperative Extension. Based on the success of the meeting (and the two that followed), Bowen noted the potential of grantees and partners working together to influence state policy making and proposed the formation of a state-wide "grantee resource exchange." The gatherings are a testament to Bowen's political savvy, and also confirmed her conviction that

the Foundation can assist [rural groups] in ways other than financial support . . . [t]hrough strategic networking, coordinating efforts, forming close advocacy alliances and taking advantage of educational and resource opportunities . . .⁷²

As a complement to the Foundation's fledgling Organizational Development Program, which at this time was experiencing growing demand, Bowen instituted an electronic technology support program for Foundation grantees. Modeled after a similar program at the Z. Smith Reynolds Foundation, the program provided small grants (e.g., for technology upgrades) and technical assistance, and proved particularly critical for small rural organizations.

Major Initiatives



Under Bowen's leadership, Sapelo focused its grantmaking around a core set of major initiatives.

Georgia Water Coalition

In 2001, contemplating a range of possible environmental issues on which to focus, Sapelo saw a rare opportunity for the public to engage in state-level water policy. The newly formed Governor's Joint Water Study Committee was in the process of developing a white paper providing recommendations on a range of water resource policies, including a statewide reservoir plan, a draft tri-state water resources agreement, and an aquifer storage and recovery strategy. Among the key questions the committee would be tackling was who owned Georgia's water—and specifically whether the state's water was a public resource or a marketable commodity. Also up for discussion was the extent to which the state bore any responsibility to "downstream" water users, both in Georgia and beyond. This was an especially critical topic because at the time, Georgia was the fourth fastest-growing state in the country. (A severe drought in Georgia just a few years later would bring these issues into even sharper focus.) And related to all of these issues was the question of what protections were needed for streamcourses and safe drinking water, as well as what safeguards were needed against industrial pollution.

In this context, the trustees felt it was critical for environmental groups to be informed and organized as the process took shape, and to be ready with effective advocacy strategies. As board member Henry Carey (a forester and conservation activist in New Mexico) pointed out at the time that the Foundation's choice to focus on water issues fit well with its core values: taking risks (and encouraging others to do so), empowering people, and impacting public policy.

The Sapelo Foundation launched the Georgia Water Coalition (GWC) with a five-year commitment and a handful of strategic grants. Within a few years the Foundation had invested nearly \$1 million in more than 30 non-profit environmental organizations across the state. At the same time, as it had in the past, Sapelo sought funding from other sources to help strengthen the effort. This work bore fruit early, with a \$150,000 grant from the Charles Stewart Mott Foundation. Over the coming years, the Foundation persisted in its attempts to build support for GWC.

Fueled by common concerns and a growing base of grassroots support, the Water Coalition enjoyed some early successes, most notably blocking proposed legislation that would have endangered headwaters, reduced stream buffers, and allowed the trading of water permits. A summer 2003 strategy session drew more than 80 groups, leading Phyllis Bowen to remark, “In my twenty-plus years of being involved in environmental issues in Georgia, this is the first time I’ve witnessed this many environmental groups, large and small, come to agreement on a comprehensive action plan.”⁷³

The Coalition was off and running. In 2004, it was instrumental in securing passage of a bill requiring the state environmental protection division to complete a comprehensive plan in 2007, and to secure state funding for it. And in a clear sign of the Water Coalition’s growing influence, as early as 2004—its third year in operation—lobbyists at the state capitol were actively seeking out Coalition leaders for guidance in developing viable legislative language. For its part, Sapelo saw its investment budding impact on public policy: “The tide is turning in favor of stronger environmental protection and the Coalition is at the crest of the wave.”⁷⁴

Still, there were many challenges ahead—first among them the draft Comprehensive Water Management Plan which came out in July 2007. During the legislative session that followed, the Water Coalition failed to stop the speaker and lieutenant governor from rushing through several provisions that it felt significantly weakened the plan.

In response, GWC regrouped, strategizing about how to improve the plan and at the same time focusing on longer-term,

permanent strategies for protecting Georgia’s water resources. As Bowen reflected at the time, the Water Coalition was at a turning point and also needed to focus on strengthening its organizational structure and making a clear-eyed assessment of which battles were winnable—and which might not be.

To inform its work, the Water Coalition (with help from the Foundation) carried out a statewide poll, which revealed higher than expected support for the protection of Georgia’s water resources. Freshly emboldened by these findings, the GWC shifted its strategy to a “campaign” approach, picking three priority issues on which it would focus its advocacy efforts in the coming session. It also made other changes: stepping up efforts to engage the full array of Coalition members, cultivating young leaders in the environmental movement across the state, and developing a professional—and more aggressive—communication strategy. This move led to the hiring of a professional public relations firm to produce a public television advertisement about the need to protect groundwater.

A few years later, the Water Coalition encountered a new stumbling block when the governor’s Water Stewardship Act included all of its recommended conservation measures except for one critical issue: the transfer of water from one water basin to another. These interbasin transfers, as they are known, were one of GWC’s priority issues and their exclusion split the Water Coalition’s leadership. Some members believed it was time to compromise, while others felt that it should withhold endorsement of the Act and keep negotiating for the issue to be addressed. In the end, the GWC stuck to its principles and strategy and did not endorse the bill. Interestingly, this marked the first time the Water Coalition had to rely on a vote instead of consensus. The next year, it picked only one issue on which to work: interbasin transfers.

In 2011, the Foundation joined with the Water Coalition in celebration of a decade of accomplishment. The remarkable success of the GWC is a testament to the power of a strategic, focused, multi-year philanthropic investment. Not surprisingly, the Water Coalition drew attention from regional and national groups like the Southeast Council on Foundations as a model for

how foundations can support coalition building, advocacy, and policy making, particularly by focusing on leadership development.

Through its support for the GWC, the Foundation gained a deeper understanding of how to build effective statewide coalitions, an appreciation for the value of timing and the importance of remaining adaptive in the face of obstacles—not to mention a newfound understanding of the power of polls as an organizing tool. The coalition also benefited immeasurably from the firsthand knowledge and experience that Phyllis Bowen brought to bear—a contribution that earned her special recognition from Georgia Conservation Voters and the Georgia Environmental Council.

Sapelo's experience with GWC also inspired new thinking among trustees about how to address air quality issues. In 2011, the Foundation launched a coordinated funding effort to support a small group of organizations opposing the construction of new coal-fired power plants. The coordinated campaign established a strategic division of labor among the groups. Immediate results were mixed, but ultimately two of three of the proposed plants were defeated. Work to defeat the third plant continues. As Phyllis Bowen summed up at the time, "This project is a good example of how the Foundation's ability to move quickly, when needed, helped it engage in effective grantmaking."⁷⁵

Conducted in 2014, Sapelo's first-ever external evaluation of its environmental program revealed widespread praise for its work on coal-fired power plants:

Sapelo's funding was crucial . . . Two of the original three proposed plants have been shelved and it is likely the third will also be abandoned. This has an enormous impact not only on Georgia, but on national precedent . . . The nexus between energy development and water use is becoming more evident around the country, and Sapelo's support of groups working to oppose the new coal-fired plants has shed an important spotlight on the energy-water nexus in Georgia. "Sapelo's support helped us leverage funds from other foundations," noted one interviewee, while another observed that, "Sapelo understands that we have to stay focused on this proposal until it's dead."⁷⁶

Georgia Budget And Policy Institute

In the early 2000s, several trustees, led by State Senator (and trustee) Nan Grogan Orrock and Phyllis Bowen, grew increasingly interested in establishing a non-partisan public policy institute in Georgia. Their model was state fiscal analysis initiatives that were appearing in other states, which were beginning to play a key role in conducting independent research and analysis on state budget, yielding invaluable information for groups working across a range of policy-related issues.

The Foundation initially worked with two consultants, Midge Sweet (who would later join the board) and Donald Ross of M&R Strategic Solutions. They were charged with assessing the potential for such an effort, identifying participants and funding partners, and defining Sapelo's role. What emerged from their efforts was a clear and nearly unanimous agreement that there was a niche for an institution that could "... make factual information in a useable way, a way that would enable nonprofits and public officials (not just state and legislative but local governments) to access, understand, and make use of it."⁷⁷

Soon thereafter the Foundation established the Georgia Budget Policy Institute (GBPI). Within a year, with help from the Healthcare Georgia Foundation, the Mary Reynolds Babcock Foundation, the Ford Foundation and other key donors, the Institute was nearly fully funded and had already published several reports.

The trustees were impressed with GBPI's rapid progress. At the time Smith Bagley and Irene Reynolds Schier hailed it as "one of the most exciting things Sapelo has ever had the opportunity in which to be engaged."⁷⁸ And Phyllis Bowen summed up GBPI as "... a steady and reliable presence ... providing excellent state budget analysis in support of low-income and underrepresented Georgians."⁷⁹

Today, with the help of a long-term commitment from the Foundation and support from other funders, GBPI publishes dozens of reports every year on budget topics ranging from state taxes and expenditures to education and healthcare budgets. Fact sheets, presentations, reports, and other publications (all freely accessible through its website) are widely used by legislators,

non-profit organizations, and individual voters. And in recent years, GBPI has played a key role as a resource for other Foundation initiatives. GBPI celebrated its tenth anniversary in 2014.

JUSTGeorgia

In its strategic plan developed in 2005, Sapelo decided to focus its social justice program around the issue of fairness in Georgia's legal system—a move driven in large part by recognition of the state's growing diversity and the need for its policies to be truly just for all of its citizens. Following the fruitful approach it used in developing GBPI, the Foundation again hired consultant Midge Sweet to assess the landscape and identify opportunities for Sapelo to engage.

The most significant finding was that the state of Georgia was in the midst of revising its juvenile justice code, characterized by one observer as “archaic and confusing”⁸⁰—a perspective widely shared among progressive groups. Sweet's recommendation to the board, which it readily adopted, was to use the code revision as a catalyst to create a statewide network of child advocacy organizations—something that had never before existed. This new focus, Bowen felt, “could result in dramatic improvements in the lives of Georgia's children.”⁸¹

The Foundation's inquiry into juvenile justice benefited immensely from the addition of Bettianne Hart to the board. At the time Hart served as assistant district attorney for Fulton County, and had previously been a state representative and judge. With Hart's help, Sapelo identified and made initial grants to three lead partners on the effort: Georgia Appleseed, Emory University's Barton Child Law and Policy Clinic, and Voices for Georgia's Children.

Within a year, the Foundation had secured complementary funding from the John S. and James L. Knight Foundation and the Community Foundation of Central Georgia. Yet, as Sapelo has learned over the years, finding a solid network of partner funders for this kind of socially progressive work can prove challenging. As Bowen put it:

They flee from issues perceived as being ‘controversial,’ when in fact there should be nothing controversial about ensuring clean water for citizens and a fair and just criminal justice system for children. Although I understand this is simply a symptom of our society ... it is disappointing to know others don't have the courage to bring positive change to our world, our country, and my own home state.

Despite this challenge, JUSTGeorgia—as the effort became known—was officially launched in 2007 at a breakfast event at the Carter Center. Sapelo paired this event with the first ceremony for the Smith Bagley Advocacy Award, given that year to JUSTGeorgia's three lead partners. What followed was a series of well-attended town hall meetings held across the state to grow the network—building support for the long-term well being of all of Georgia's children.

Today, JUSTGeorgia's primary goal is still to support a long-term coalition that will advocate, monitor, and report on the conditions, laws, and policies affecting the justice and safety of Georgia's youth. Its member groups—many of them small NGOs from all corners of the state—committed themselves to the establishment of a “just and equitable” juvenile justice code. In short order, broad support followed from lawyers, judges, and childcare providers. Later that year when the State released its Model Georgia Juvenile Code (essentially a first draft of the new code), JUSTGeorgia became the primary information resource for advocacy groups, policy makers, and the media. This role culminated with its publication in 2009 of *Common Wisdom: Making the Case for a New Georgia Juvenile Code*.⁸² This educational tool for policy makers grew out of three years of research, analysis and stakeholder input.

During the 2009–10 legislative session, JUSTGeorgia built a base of key bipartisan support for the bill that would revise the code. They also had the support of Governor Nathan Deal, himself a retired juvenile court judge. But the bill did not pass that year—or the next. One major reason was concerns about how the state would pay for its implementation. JUSTGeorgia members also argued

that the governor’s simultaneous push for his own criminal justice reform package served to dilute support for the bill.

In response to the bill’s failure, JUSTGeorgia redoubled its efforts by engaging all of its 600 members and recruiting new organizations, hiring a field coordinator, and—with the help of GBPI—strengthening its fiscal analysis. “They knew they had to pull out all the stops,”⁸³ Bowen recently reflected. Their efforts paid off, and in 2013 the Child Safety and Protection Act became law—one which JUSTGeorgia hopes will serve as a model for other states. With this win, JUSTGeorgia has shifted its focus toward ensuring that the new law is fully and equitably implemented. The Foundation will continue supporting JUSTGeorgia as it works to build a statewide network of child advocacy organizations

Emerging Latino Leaders

Since the early 1990s, the Foundation has been interested in the potential of multiracial and cross-cultural coalitions as a strategy for advancing the cause of social justice in Georgia. There was no shortage of grassroots appeal—as well as a general sense that the strategy had enormous potential to build momentum for social change. One of the biggest challenges for the Foundation was determining the right time for it to engage—specifically, how to know when potential lead partners were ready, and when there was a critical mass of community support that could help sustain such an all-consuming undertaking.

Out of the Foundation’s early experiences came an understanding among trustees that the Foundation needed to be more focused in its strategy. In the context of Georgia’s growing diversity and the rightward shift of the state’s political establishment, the trustees in 2004 decided to focus on identifying and supporting emerging leaders in Georgia’s Latino communities. As with other successful initiatives, Sapelo drew on two resources to assess opportunities and challenges: the leadership of a trustee—this time Tirso Moreno, general coordinator of the Farmworker Association of Florida and the board’s first Latino—and a consultant, Pequi Mariduena. Mariduena recommended that the Foundation focus its investments in established organizations, including

the Mexican American Legal Defense Fund (MALDF), National Council of LaRaza, and the Georgia Association of Latino Elected Officials (GALEO). With support from Sapelo, GALEO, through its Latino Community Development Fund, convened a highly successful Musgrove conference for Latino leaders from across the state. Another major accomplishment of the Foundation’s work in this area was a study it commissioned at Moreno’s urging, on the impact of deportation and detention on the children of illegal immigrants, which was published in 2010.⁸⁴

Holding Course



Foundation Investments

Foundations are perhaps best known for what they fund—their grants, their grantees, and special initiatives—but as recent economic downturns so starkly attest, their giving is perpetually at the mercy of the stock market. Over the years, the Sapelo Foundation has been no different: the 2002 slump, for example, resulted in a major decline in its assets. Concerned primarily for the well-being of its grantees, the Foundation's response was characteristically progressive and strategic: proactively encouraging grantees to diversify funding sources to make up for the shortfall, and to become itself ever more strategic in its investments. As Bowen noted at the time: “[T]he Foundation must be conscious of this trend and make smarter, more strategic decisions that assure the survival of our most effective and stable nonprofits in all program areas.”⁸⁵

The Foundation's sale of its remaining holdings on Sapelo Island did soften the impact of the declining economy on its giving. In contrast, the effects of the economic slide on other foundations were much worse during this period: many cut payouts by as much as 50 percent. And although the stock market's continued unpredictability made for a perpetual “guessing game” as Bowen put it, trustees took the economic slump as a call to action. Bowen felt it was “imperative that we maintain the Foundation's financial stability while also protecting our past investment in these organizations as they struggle to gain their feet.”⁸⁶

There was also general concern around this time about the need to meet IRS requirements, particularly around payout levels—and the challenge of doing so in a perpetually unpredictable market. (Tax laws governing foundations in the U.S. require them to expend at least 5 percent of their assets annually for charitable purposes.)

The board began by clarifying its investment priorities—to keep management fees low, to keep performance high, and to diversify assets—and set a target total return of 9 percent.

Another key part of the Foundation's strategy was a move in 2005 to reduce grant levels to the minimum required by the IRS for a minimum of five years. This would allow Sapelo to rebuild its assets and protect against market fluctuations. Limiting grants in this way achieved two important benefits for tough economic times: 1) the creation of a reserve that enabled the Foundation to maintain giving at an acceptable level, and 2) the ability to make more gradual the necessary adjustments in giving.

These strategies proved effective: the market's decline in 2008, for example, reduced the Foundation's assets to a 12-year low, but just a year later it was able to sustain its grant programs at near-2007 levels.

During the 2000s, there was also growing interest among trustees in the screening of investments based upon social criteria, a trend that coincided with the rise of socially responsible investing in the United States. Advocates argued that the Foundation's investments should reflect its mission, but some trustees were concerned that limiting investment options risked undercutting performance. After much debate and research, the board decided to allocate 5 percent of Sapelo's assets to socially responsible investments on a trial run, later expanding it to nearly one quarter of its assets.

Emerging Issues and Initiatives

As the Foundation has moved into the new millennium, it has continued to learn and adapt, to celebrate its successes while at the same time boldly pushing forward. The Foundation's latest strategic plan, launched in 2011, established two new internal structures to help it remain dynamic and effective. Trustees created an “incubator” for identifying, researching, and testing ideas for new areas of work. The incubator will enable the Foundation to be more intentional by consolidating and systematizing its work on emerging ideas and strategies. Clearer intentions should ensure better use of resources, and thus have greater impact on critical

issues in Georgia. To date the incubator has led to the establishment of one Foundation project, New Americans (discussed below).

In another critical move, the board situated the new incubator within a set of existing “tools” that support and strengthen the Foundation’s strategic impact. One key tool identified by the board was Musgrove conferences, with an annual budget commitment of \$20,000. These create an opportunity to explore new ideas over several days with key stakeholders. Since the first one held in 1989, these Musgrove conferences have been invaluable in catalyzing new Foundation initiatives and broader social movements (*see* Appendix 2, p. 95). Another designated tool was the Georgia Budget and Policy Institute, which began as a grant-funded initiative and has become increasingly useful to other Foundation initiatives as an information resource.

It is worth noting that the proven value of GBPI to Sapelo itself contributed to a growing recognition among trustees of the potential—and need—for making connections across the Foundation’s programs. Doing so, Bowen argued, would “leverage and strengthen” Sapelo’s work.⁸⁷ And indeed it has.

SCHOOL DISCIPLINE During JUSTGeorgia’s engagement in the revision of Georgia’s juvenile justice code, another pressing, intertwined issue surfaced: race-based inequities in the application of school discipline policies. Using the new “incubator” as a mechanism, and with the help of consultant Chris Sturgis, the Foundation determined that there was a critical mass of stakeholders interested in strategizing around this problematic “school-to-prison pipeline.” For greatest effectiveness, Sturgis recommended focusing on one central topic: suspension and expulsion rates. When JUSTGeorgia readily convened stakeholders, they soon expressed reluctance about being part of the organization’s network—even though school discipline was generally accepted as a natural “next step” following the code revision. Instead, stakeholders preferred creating an entirely new coalition, and quickly became focused on organizational structure and leadership issues.

Adaptive as ever, the Foundation recognized that it had sought to engage too many stakeholders too early and decided to regroup

and reassess its strategy. While a conventional organization might have taken this experience as a setback, Bowen and the trustees saw it as a predictable hazard in the pursuit of progressive social change. And on a practical level, as Bowen later reflected, the experience provided valuable information about how the Foundation could strengthen the fledgling incubator process.

NEW AMERICANS In 2012, with the revised juvenile code close to passage, the board decided that the next area of focus for Sapelo’s social justice program would be civic engagement among immigrant communities in Georgia’s increasingly diverse population. Here again, the work began with research. In interviews with potential stakeholders, consultant Pegui Mariduena found that Asian and Latino communities—together the largest immigrant population in the metropolitan Atlanta area—were more focused on addressing basic human services needs and on maintaining a low profile in an treacherous anti-immigration atmosphere.

Sensing the potential political power of organizing their constituencies, however, stakeholders expressed strong interest in participating in exploratory meetings. The energy and excitement at the gatherings were palpable, as Phyllis Bowen reported afterwards: “Many participants said it was the first time they had ever been in a meeting where they could speak frankly about voter engagement and civic participation.”⁸⁸

Emboldened by the research findings and stakeholder gatherings, the Foundation has continued to deepen its understanding of the landscape and opportunities in which it could most effectively engage.

PROGEORGIA Sapelo’s promotion of civic engagement in Georgia has roots in its voting rights work, which began in 2000 out of concerns about irregularities and inequities in that year’s presidential election. For its part, the state had responded to these concerns by overhauling its election law with two improvements: standardized voting machines and simpler, clearer regulations. With near unanimous support for these reforms, the Foundation seized an opportunity to raise the issue of voting rights across the state and

increase public participation in the electoral process, and funded a series of exploratory projects run by the Institute for Southern Studies.

The Foundation's most recent and arguably most exciting foray into civic engagement has been its effort to establish a Georgia "state table," now known as ProGeorgia, using the proven and effective model developed by State Voices. This model organizes strategic, non-partisan civic engagement across a range of interest groups; currently there are state tables in 22 states.

Trustee Henry Carey first proposed the idea to the Foundation in 2007, introducing Phyllis Bowen to Eli Lee, then director of the Santa Fe-based Center for Civic Policy. Recognizing the potential for such an entity in Georgia to advance the Foundation's own mission, the board charged Phyllis Bowen and Krista Brewer—former president of longtime Sapelo Foundation grantee Women's Action for New Directions—with convening two planning meetings facilitated by Eli Lee. A motivated core group of 11 nonprofits emerged. They quickly secured additional funding, established partnership agreements, and just one year later hired an executive director. ProGeorgia's first project was developing a voter registration strategy in the metropolitan Atlanta area.

Already at this early stage, ProGeorgia is proving to be an effective addition to the Foundation's activities. It is, for example, an ideal forum for expanding the reach and impact of GBPI's research. Trustees are also exploring the possibility of strategically linking ProGeorgia and the Foundation's New Americans effort, to take advantage of their common focus on civic engagement.

The power of the State Voices model, together with ProGeorgia's remarkable momentum and its emerging role as a unifying force and framework for the Foundation's other initiatives, has generated significant enthusiasm and interest among the Foundation's board, staff, and partners. As Phyllis Bowen recently observed: "This is by far the quickest any Foundation-funded coalition of groups has come together. ProGeorgia is one of the most exciting projects Sapelo Foundation has ever initiated."⁸⁹

Epilogue



The Sapelo Foundation's story began with a chance meeting and an idea—a vision for protecting and sustaining the land and waters of Sapelo Island, and for empowering and enriching the lives of its people. Over the years, this vision ripened to encompass the entire state of Georgia. This story is also about a family's desire to give back and now, more than half a century later, there is much to celebrate for such a small institution that has had such an enduring and far-reaching impact. The Foundation can count among its accomplishments all that it has learned through its remarkable evolution: lessons about holding fast to a vision for progressive social change and staying focused, about learning and adapting, about taking risks and facing challenges head on, and about the value and necessity of relaying power and knowledge from one generation to the next.

One need look no further than today's front pages to know that the work of the Foundation is unfinished. No one sees this more clearly than the trustees, the Executive Director Phyllis Bowen, and Office Manager/Program Officer Barbara Bowdry. The years ahead will undoubtedly bring challenges, but judging from the Foundation's remarkable impact over the decades, it will meet such challenges boldly. In Phyllis Bowen's words:

The Sapelo Foundation stands as an example of what a small foundation with limited resources can accomplish when it has a creative board and a clear mission. It's all about being willing to take risks—willing to fail, willing to fund what you think needs to be funded. Trying new things, being very strategic. It's that simple ... I hope we look different in twenty years—because that will be a sign that we're growing and changing.⁹⁰

**Board meeting, May 2005 (top)**

1st row: Katharine Grant Rodli, Irene Reynolds Schier, Barbara Bowdry, Annemarie Reynolds, Nan Grogan Orrock, Bettieanne Hart; 2nd row: Russell Long, Susan Lehman Carmichael, Smith Bagely, Nicole Bagely, Henry Carey, Phyllis Bowen, William K. Broker

**Board Meeting, May 2009 (middle)**

1st row: Susan Lehman Carmichael, Irene Reynolds Schier, Annemarie Reynolds; 2nd row: Barbara Bowdry, Phyllis Bowen, Bettieanne Hart, Nan Grogan Orrock, William K. Broker, Jerry Gonzales; 3rd row: Tirso Moreno, Russell Long, Nicole Bagely, Katharine Grant, Henry Carey, Ben White

**Board meeting, May 2014 (bottom)**

1st row: Michael Grant, Midge Sweet, Jerry Gonzales; 2nd row: Henry Carey, Nicole Bagely, Irene Reynolds Schier, Phyllis Bowen, Bettieanne Hart, William K. Broker, Barbara Bowdry, Philip Carey

Acknowledgments

Annemarie Reynolds and Irene Reynolds Schier



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And most importantly, many heartfelt thanks to all the many people who have devoted their time and expertise to the Foundation. Our foremost gratitude and appreciation goes out to the current director Phyllis Bowen and her assistant Barbara Bowdry for their deep dedication and valuable work of managing and administering the Sapelo Foundation day by day and year after year. We also take this opportunity to express our hearty thanks to the trustees of the Foundation. While enduring long travels and spending their free time on Foundation meetings and site visits, their thoughtful and responsible guidance when considering the right cause and the right project has moved the Foundation steadily forward. Last but not least, we thank our lawyer Ben White for being available as needed for sound legal advice.

Now over 65 years in existence, the Sapelo Foundation today stands on solid ground. It is our fervent hope that it will live on to continue its important work of safeguarding and benefiting the people and the state of Georgia.

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Appendix 1: Giving Philosophy, from 1981

96
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In Brief Nancy Janna²⁷ 81

GENERAL PHILOSOPHY:

Support projects that develop human resources and projects that take the preventive approach.

DEVELOPING HUMAN RESOURCES - with emphasis on:

1. All phases of formal education including elementary, secondary, community colleges, job skills, higher and continuing.
2. Projects that involve people who are identifying and developing solutions to their own problems.
3. New ideas that allow people to overcome barriers that keep them from achieving all that their abilities entitle them to.
4. Leadership development for youth and community leadership development.

Rather than doing something to or for someone, give people the tools, the information, the skills, and contacts with which they can do something themselves.

PREVENTION - with emphasis on:

1. Projects that deal with environment and energy resources.
2. Health care delivery concentrating on out-reach and with emphasis on nutrition and population control information.
3. Support systems within education structure such as improved counseling services, library materials.
4. Focus on youth.
5. Programs or projects that enhance concept of self whether individuals, groups or communities.
6. Encouraging democracy in action.

CONSIDERATION GIVEN TO PROJECTS

1. With good leadership.
2. With the possibility of significant state impact.
3. With the possibility of significant leverage.
4. Which meet a distinct need.
5. Which focus on problems of increasing significance.

Appendix 2: Selected Musgrove Conferences

1989

Conference on Rural Development

Partnerships

National meeting of National Network of Grantmakers

1991

African-American Leadership Roundtable, sponsored by Center for Democratic Renewal

1992

Health care reform (Led to organizing the campaign Georgians for a Common Sense Health Plan).

1994

Next Generation of Philanthropy Racism and Rural Education

1995

Urban Rural Summit Money and Politics; Organizing Against the Political Right Southern Rural Development Council (SRDI) annual conference.

1996

Coastal Conference

1999

National Parks and Conservation Association visioning session to develop plan for national parks and public lands.

2000

Southern Rural Development Initiative: "Jump-starting Community Based Development in Rural Georgia," convening leaders from the political, philanthropic, grassroots, community development, and civil rights sectors of Georgia to create a multi-year effort to increase public and private resources available for community-based development in rural Georgia.

2001

Forest Trust: "Treating Public Forests To Reduce Fire Risk" convening national experts to facilitate the development of a

scientifically sound, balanced approach to reducing the risk of wildfire on public land.

2002

Southern Regional Council: "Forging New Coalitions in the 21st Century" bringing African-American and Latino/a leaders in Georgia together into partnership around common issues and concerns.

2003

Georgia Wildlife Federation: "The Future of Georgia's Water Resources, A Visionary Approach to Water Management for the Next 100 Years," reviewing the Georgia Water Coalition's past year and discussing future strategies to ensure water resource protection and management.

97
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2004

Center for Policy Alternatives: “Workforce Supports Leadership” convening Georgia legislators to discuss issues pertaining to workers’ rights and systemic problems associated with the treatment of workers in Georgia.

2005

Global Warming, hosted by Georgia Air Coalition

2006

Georgia Conservancy: “Global Warming in Georgia” convening members of the Georgia Air Coalition and other experts to discuss global warming and its potential effects in Georgia.

2009

GALEO Latino Community Development Fund: “Latino Conference at Musgrove 2009” convening state leaders to discuss immigration policy and other issues affecting the Latino community in Georgia.

2010

JUSTGeorgia conference for nonprofits to help build statewide advocacy network and build support for passage of new juvenile code.

2012

Building a Progressive Policy Strategy in Georgia: a convening of nonprofit leaders and others to learn about models in other states and resources available to facilitate progressive social change.

2013

ProGeorgia Retreat: convening of Georgia nonprofit leaders for organizational planning purposes.

2014

New Americans Working Group Retreat: convening of Georgia nonprofit leaders to envision ways to increase civic engagement among New American citizens.

Appendix 3: Trustees, Presidents, Directors

Trustees of the Sapelo Foundation

Richard J. Reynolds, Jr.* 1949–1964
Frank M. Scarlett 1949–1965
A. M. Harris 1949–1971
Stratton Coyner 1949–1964
Ledyard S. Staples 1958–1983
Muriel M. Reynolds* 1962
Dr. G. H. Lauff 1962–1964
Dr. Annemarie S. Reynolds* 1962–2009
Nancy S. Reynolds* 1969–1985
Richard W. Courts 1969–1970
Luhr G.C. Beckmann 1969–1970
Herrick K. Lidstone 1969–1976
Edward R. Gray 1969–1983
Alfred W. Jones, Sr. 1970–1982
Dr. Richard H. Pough 1970–1985
James O. Wright 1973–1982
Smith W. Bagley* 1977–2005
Alfred W. Jones, Jr. 1977–1982
Katharine B. Mountcastle* 1982–1997
Jane B. Lehman* 1982–1988
William K. Broker 1985–present
Susan Lehman Carmichael* 1991–2009
Rose Johnson 1993–1996
Irene Reynolds Schier* 1995–present
Henry Carey* 1998–present
Frank Bobrow-Williams 1998–2003
Nan Grogan Orrock 2001–present
Katharine Grant* 2001–present
Nicole Bagley* 2003–present

Bettianne Hart 2004–present
Russell Long* 2004–2009
Tirso Moreno 2007–2010
Jerry Gonzalez 2008–2014
Michael Grant* 2009–present
Midge Sweet 2011–present
Philip Carey* 2012–present

Recent Presidents of the Sapelo Foundation

Dr. Annemarie S. Reynolds 1982–1989
Smith W. Bagley 1989–2001
Susan Lehman Carmichael 2001–2007
Henry Carey 2007–2013
Irene Reynolds Schier 2013–present

Executive Directors of the Sapelo Foundation

Marge Tabankin 1983–1987
Alan McGregor 1987–1995
Deborah Sheppard 1995–1997
Phyllis Bowen 1997–present

* (members of the Reynolds family)

was on the 16th day of December, 1949,
duly incorporated under the laws of the State of Georgia by the Superior Court of
McIntosh County for a period of thirty-five years
from said date, in accordance with the certified copy hereto attached, and that a certified copy
of the charter of said corporation has been duly filed in the office of the Secretary of State and
the fees therefor paid, as provided by law.



IN TESTIMONY WHEREOF, I have hereunto set my hand
and affixed the seal of office, at the Capitol, in the City of
Atlanta, this 20th day of December in the year
of our Lord One Thousand Nine Hundred and Forty-
nine and of the Independence of the United States
of America the One Hundred and Seventy-fourth.


SECRETARY OF STATE, EX-OFFICIO CORPORATION

So long as Faith and Freedom reigns,
And loyal hope survives,
And gracious Charity remains,
To leaven lowly lives,
While there is one untrodden tract
For intellect or will,
And men are free to think and act,
Life is worth living still.

Extract from poem *Is Life Worth Living*
Alfred Austin 1835-1913





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