

A Fresh Look at Eligibility: Hearing Jessie Ball duPont's Voice in a Changing World

When Jessie Ball duPont wrote the will governing the charitable fund that bears her name, she was specific about what she hoped the fund would do, but generous in granting the fund's trustees latitude in their approach.

As the Jessie Ball duPont Fund concludes its 40th year, the trustees are expanding their views on grantee eligibility, all the while carefully listening to the guidance of Mrs. duPont.

In her will, Jessie Ball duPont set out clear, if sparse, directions for the Jessie Ball duPont Fund trustees to follow in dispersing charitable funds from the foundation:

"I request my trustees, but I do not direct them," she wrote, "to include among the beneficiaries of the income the religious, charitable, literary and educational organizations to which I have made contributions during any of the five calendar years ending December 31, 1964."

That preference became the governing rule for grantee eligibility, though it did not account for Mrs. duPont's instructions in their entirety.

In the Fund's first years, Hazel Williams, who had been Mrs. duPont's personal secretary, carefully compiled a list of organizations to which Mrs. duPont had made gifts during the prescribed period. Refined and corrected over time, this list became "the defined universe of grantees" to which the Jessie Ball duPont Fund would lend its support.

There are many benefits to having a restricted number of grantees, the chief one being the permanent relationship between funder and grantee. For the Fund, that fostered a level of trust, candor and understanding rare in the world of competitive philanthropy. Eligible organizations felt they could come to the Jessie Ball duPont Fund with their cares and concerns and receive knowledgeable advice and assistance. The Fund, meanwhile, cared as much about the health of an organization as its body of work, recognizing that the Fund's

philanthropic future depended upon the stability and relevance of its eligible organizations.

Initially, the eligible organizations numbered 363. Through mergers and dissolutions, the number declined to about 330 by 2000, and 322 by 2017.

Meanwhile, the challenges facing communities changed tremendously. The world that Mrs. duPont knew in the 1960s was vastly different than the world in which the Jessie Ball

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duPont Fund lives today. Religion, the arts, the environment, politics, the media, education, health care, communication, recreation and civic life all are different, as is the size, shape, color and ethnicity of the populations in communities.

Through the years, the Jessie Ball duPont Fund found ways to adapt to these changes. For example, the Fund partnered with The Community Foundation for Northeast Florida, an eligible, to bring a broad capacity building program to Jacksonville's child-serving nonprofits, many of which were not eligible for direct support from the Fund. The Fund partnered with eligible religious organizations in Florida and Delaware to develop community loan funds that would provide capital to projects

serving people in those states. The Fund helped numerous eligible colleges and universities partner with non-eligible community-based nonprofits to provide services to inner city neighborhoods and rural communities. And it partnered with the Community Foundation to meet community needs in rural Port St. Joe, Florida, through creation of an advised fund.

But in each of these cases, grants were only awarded directly to organizations meeting the five-calendar-year restriction. And those eligible organizations were required to be active participants in the work, contributing resources and talent.

Regularly, the trustees returned to the will, studying Mrs. duPont's instructions, which also included this:

"In the event the trustees do not use all of the income for the ... organizations to which I have made contributions in the last five years, I direct that the surplus income hereunder be used for the temporary relief of individuals residing in Florida, Delaware or Virginia who are in need."

This directive is precise in *what* the Fund should support, unlike the five-calendar-year restriction, which addresses *who* the Fund should support. Importantly, it is of equal weight with the calendar restriction. However, it has not been implemented heretofore.

After careful legal review and extensive deliberation, the trustees in 2017 decided to employ Mrs. duPont's instructions in their entirety.

All organizations to which Mrs. duPont made gifts in the five years ending December 31, 1964 will remain eligible for support from the Fund.

In addition, the trustees will, at their discretion, consider grants to other organizations whose work provides relief to those in need in Florida, Delaware or Virginia. These grants will be made by invitation only; the trustees will not entertain unsolicited proposals.

This approach will enable the trustees to support important community work that otherwise might have been difficult to support.

In Jacksonville, for instance, the Fund is deeply interested in supporting affordable housing yet the only housing organization Mrs. duPont supported in Jacksonville closed its doors in 2016.

In early 2018, the trustees made a grant of \$150,000 to Ability Housing, an organization with a robust history of affordable housing development in Jacksonville and Central Florida, but one that was not in existence during Mrs. duPont's lifetime. The grant, initiated by the Fund and awarded only after careful legal review, marks a significant step reflecting the trustees' decision to follow Mrs. duPont's wishes in their entirety.

In her will, Mrs. duPont's voice is clear: she cares about the three states that she called home, she cares deeply about people in need, and she is aware that society will change. "Being aware of changing conditions, I desire to provide additional flexibility for this trust fund..." she states.

Mrs. duPont's great wisdom in creating the Fund was her careful touch. She did not bind her trustees; she gave them opportunity. Today's trustees have listened carefully to her words, and welcome this opportunity to expand service and extend the legacy of Jessie Ball duPont.