



Making grants for operating support

“Overhead.”

It’s not quite the nonprofit equivalent of a four-letter word, but it can be a touchy subject. There certainly are variances in opinion surrounding the funding of operating expenses.

Some nonprofit organizations are reluctant to discuss operating expenses with funders. And some funders are still not comfortable making grants to support administrative costs.

The North Carolina Community Foundation encourages its affiliates and fundholders to make grants to fiscally responsible nonprofit organizations that build a case for operating expenses. “We are not reluctant to support overhead,” said NCCF Director of Grants and Scholarships Leslie Ann Jackson. “We’ve even customized our online application for our community grantmaking program so that it allows grantseekers to make their case for administrative costs and is no longer as ‘program driven.’”

This is not a new trend, but a nationally driven effort to change the mindset among those who categorically state that they do not support overhead. The National Committee for Responsive Philanthropy published guidelines called Criteria for Philanthropy at its Best, encouraging grantmakers to invest in the “health, growth and effectiveness of its nonprofit partners by providing ... grant dollars as general operating support.” NCRP

and its members have championed the benefits of such support by noting that:

- It provides flexibility for meeting pressing community needs and achieving impact.
- It eases administrative burdens for grantmaker and grantee alike.
- It contributes to nonprofit sustainability and capacity-building.
- It signals trust between the funder and grantee without sacrificing accountability.
- It shifts attention from limited program outcomes to broader organizational and social impact.

“Overhead
is not the enemy
of the cause.”

Dan Pollotta*

Jackson pointed out that restrictive grants can often inhibit program delivery. “Grants for operational expenses can certainly be applied to programs as needed and say to the applicant that ‘we trust you, we trust the work

that you do and these resources are for you to apply to your service delivery,’” she said. “It’s a good way to say you support the nonprofit’s overall mission.”

An oft-circulated article published by the Stanford Social Innovation Review about funding overhead for nonprofits entitled “The Nonprofit Starvation Cycle” noted that some funders don’t have a realistic idea of what it costs to operate a nonprofit. Charitable organizations, in return, feel some pressure to conform to these expectations. A cycle of skimping on overhead is created. And programs, ironically, suffer.

One suggested solution is for funders to shift their focus from costs to results. An article by Mary Mountcastle for the North Carolina Center for Nonprofits noted that the conversation should be about goals and outcomes, rather than “input” or the type of grant. “We should focus on the outcomes grantees want to achieve, how they know they’re making progress toward those outcomes and how they’ll deal with the inevitable bumps in the road,” she said.

NCCF CEO Jennifer Tolle Whiteside said it’s a funder’s responsibility to support the mission of nonprofits in order to build the ever-expanding demands on their services. “It’s our job

Continued on page 6

The power of blended gifts

History tells us the ancient Sumerians were the first to discover that copper and tin could be combined to form a much stronger substance: bronze. Tools of bronze were a powerful asset that enabled the Sumerians to build one of the most prominent civilizations of early Mesopotamia.

In today’s philanthropy, there is a new strategy emerging that likewise combines several forms of giving for greater impact. “Blended giving” is the term often applied when annual, major, and planned gift techniques are integrated to maximize results.

In some ways this approach is hardly new. Charitably minded individuals have always given across many platforms – rarely just one alone. So how is blended giving different? The cornerstones of blended giving are planning and strategy. Careful planning blends different giving components into a single strategy that serves the donor’s philanthropic goals, personal financial situation, and of course the charitable cause itself.

Think of the blended gift as a single powerful tool for effective giving. Let’s consider some specific examples of how it might work:*

EXAMPLE #1

At the NCCF, we work with many donors who want to have an immediate impact on their favorite charitable cause, enjoy seeing the impact of their giving during their lifetimes, and ultimately leave a legacy gift to support a strong future for that cause. Blended gifts are often used to achieve these goals, as the following example demonstrates:

Jim and Judy Smith established the Smith Family Scholarship Endowment with the NCCF to help students from their beloved local high school with college tuition expenses. They initially funded the endowment with a large gift made possible through the sale of the family business. They enjoy meeting the students their scholarship is benefiting, but realize that there will be a growing future need for additional tuition support.

The Smiths need to conserve all of their assets for retirement, so additional current gifts to the scholarship are not feasible. However, they have both made the Smith Family Scholarship Endowment the residual beneficiary of their estates through a simple directive in their wills. The eventual size of this gift is unknown at present, but could result in a substantial boost to the scholarship in years to come.

This combination of major and planned gifts will strengthen the giving power of the Smith Family Scholarship in ways not possible through either gift alone.



EXAMPLE #2

Muriel has two favorite charities she has long supported in her community. Each year she directs generous annual gifts to both. Muriel has no living spouse or children. She is comfortable in her late retirement, and no longer needs a retirement account she established years ago. She also owns a paid-up life insurance policy for which she no longer has a need. She owns a large home.

Both charities are facing current and long-term need for capital improvements. Working with her financial advisor and the development officers of both charities, Muriel adopts the following strategy:

- Both charities will receive a major gift of appreciated securities to address immediate capital improvements.
- One charity is named the owner and beneficiary of the paid-up life insurance policy.

Continued on page 6

Standards of excellence



Lots of organizations and professions have national standards. It's shorthand for saying your group has taken extra steps to achieve some level of accreditation or an external stamp of excellence. It's a way to say to the world: "We rock!"

You may have noticed the words National Standards for U.S. Community Foundations on many of NCCF's materials, but you may not know what this means. We are a proud recipient of the National Standards for U.S. Community Foundations™ program, which is a peer-driven, regulatory accreditation program that reflects our compliance with legal requirements and advancement of best practices.

I am pleased to serve as a member on the National Standards Board, which is responsible for the quality, value and integrity of compliance with National Standards. I will add here that we received our accreditation long before I joined the review board.

We all know that the dollars set aside for charitable giving are limited and precious. The institutions that donors choose to support must be credible and trustworthy. As a symbol of excellence and rigor, the National Standards Seal helps philanthropists and their professional advisers recognize and choose community foundations as a sound place to give so they can make a difference.

The National Standards for U.S. Community Foundations™ reviews community foundations in two areas. First, peer and legal reviewers check their policies and procedures for compliance with applicable laws and regulations. Second, reviewers check how community foundations put these policies and procedures into practice and into their operations. This operational review focuses on five areas: structure and governance; resource development; accountability; grantmaking; and donor relations. Peer and legal reviewers are experienced in community foundation operations and are vetted and trained to ensure high-quality examinations.

We at NCCF participate in National Standards because we see the value in being recognized for going above and beyond what the law requires of us and to demonstrate that we are a responsive, responsible community resource. The National Standards seal indicates that we are serious about the pursuit of excellence; that we can demonstrate accountability and our impact on the community. This makes us distinct from other foundations and nonprofits.

Rock on.

Jennifer Tolle Whiteside
President and CEO
NCCF

NCCF appoints new statewide board chair, directors

NCCF's board of directors announces a new chair and two new directors.

Linda Staunch has been appointed chair of the board. She is president and CEO of Linda Staunch & Associates, a public relations/marketing communications business based in New Bern. She is a past president and charter member of the board of advisors of the Craven County Community Foundation, an affiliate of NCCF.



Linda Staunch

Staunch's current board involvement includes the North Carolina Symphony and president of the symphony board in New Bern. She is an executive board member of the UNC Lineberger Cancer Center in Chapel Hill. A longtime Rotarian, she was the first female member and president of the New Bern Rotary Club,

where she also is a Paul Harris Fellow. She is an advisory board member of the NC Aquarium at Pine Knoll Shores and serves on the board of the Twin Rivers YMCA in New Bern. A graduate of Peace College and the University of North Carolina at Chapel Hill, she also earned a master's degree from East Carolina University. She attends First Presbyterian Church.

NCCF also is pleased to announce the appointment of two new directors to the statewide board: Alexander Graham Floyd and Steven Wangerin.

Floyd lives in Granville County and Raleigh. He is founder and president of Floyd Oil Company. The privately held, family owned company focuses on



Alex Floyd

NCCF's newest director emeritus instrumental to our growth, success

When Billy Woodard retired from North Carolina Community Foundation's statewide board in the spring of 2015, many directors who have had the privilege to serve with him immediately thought about how his stellar, dedicated service to the Foundation could be acknowledged.

"Billy's 22-year tenure on the Foundation's board goes above and beyond what most have given," said James W. Narron, a member and past chair of the statewide board who also is a friend of Woodard's. "He was a trusted colleague and confidante of Lewis Holding (NCCF's founder), so he understands the vision and passion behind this organization more than most."

Woodard's contributions to NCCF actually began before the organization was even formed. He heard firsthand the vision that Holding had for a community foundation serving rural North Carolina and knew that the idea had originated with his father, R.P. Holding, Sr., taking years to come to fruition.

When the time came to launch the Foundation, Woodard traveled around eastern North Carolina assembling people to listen to the vision. He was instrumental in establishing affiliates in Granville, Harnett, Hoke, Montgomery and Moore counties.

Woodard recalled talking about the Foundation and asking for support during those early days. And with characteristic modesty, he gave the credit to Lewis Holding. "People were willing to listen to the idea of a community foundation and to contribute because they knew and trusted Mr. Holding," he said.

Woodard was unanimously voted director emeritus earlier this year, an honor reserved only for those former board members who have made outstanding contributions through exceptional leadership to the Foundation. He served as secretary to the board and a member of the executive committee for more than 15 years. And in 2010 he received the Lewis R. Holding Award for Philanthropic Leadership, which is



Billy Woodard accepted the Lewis Holding award from Carmen Holding Ames in 2010.

bestowed annually to a Foundation volunteer who has demonstrated exceptional leadership resulting in outstanding stewardship and growth.

NCCF's board also will issue a formal proclamation to honor his distinctive service, with many directors pledging to make gifts in his honor to the North Carolina Community Foundation Endowment, a fund that he personally spent a great deal of time building and had given generously to himself and through the Fidelity Bank, which he led as chairman of the board.

NCCF CEO Jennifer Tolle Whiteside described Woodard as a board member who led with quiet authority and was generous with his knowledge of the Foundation and the state. "Mr. Woodard's commitment to growing the capacity of NCCF both through our operations and our footprint in rural North Carolina has been instrumental to our success over the years," she said.

Woodard said he knew the NCCF would be a success. "I just didn't imagine it would be where it is today," he said. "It shows the value of Mr. Holding's foresight to bring philanthropy to small rural and remote areas so that local people could participate and plan for the future of their own communities."

Woodard called his years on the board of NCCF an "inspiration," and added that he feels "good about where it is and where it is going."

To learn more about Billy Woodard, visit nccommunityfoundation.org and go to *The Back Story* to read a 2011 feature article and see a YouTube video.

the acquisition of long life oil and gas assets in the southwestern United States as well as real estate and venture capital in North Carolina. He is a graduate of UNC-Chapel Hill, where he received both his undergraduate and graduate degrees. He was educated at Virginia Episcopal School, where he is a former trustee and remains active as a volunteer. He attends Christ Episcopal Church in Raleigh.

Wangerin is CEO of W.T. Humphrey, Inc. in Jacksonville, which is the parent company for several enterprises that provide general and mechanical contracting for federal projects in the southeastern United States. He is a graduate of UNC-Charlotte and the Louisiana State University Graduate School of Banking. Wangerin is involved in many organizations and civic activities, including the NC Infrastructure Authority; the Jacksonville Rotary Club; the Jacksonville-Onslow Economic Development Board, which he chairs; and serving as president of the Onslow Caring Communities Foundation, an affiliate of NCCF.



Steven Wangerin

State of Generosity™

A sample of Foundation news about people and events across North Carolina

Women's giving is strong at NCCF

Women's giving is alive and well at NCCF! Last fiscal year, our nine regional giving networks and the **Women's Fund of North Carolina**, our statewide women's grants program, awarded nearly \$280,000 to nonprofit programs that support women and/or women and families throughout the state. NCCF is proud of the niche we've developed to support women's giving programs. We learn something from these philanthropists every day! Visit our website and go to the Women's Giving tab to learn more about each giving circle.



Many of NCCF's women's giving groups are in the midst of grant cycles or have just awarded grants. The **Cary Women's Giving Network** awarded \$17,000 in grants this spring. Recipients included Note in the Pocket, represented by Board Secretary Susan Pruskin, left; The Hope Center at Pullen, represented by Stacy Bluth, second from left; Cary Family YMCA, represented by Allison Bost, second from right; and Transitions LifeCare, represented by Jennifer Kreimer, far right. Also photographed is Karen Mills, center, grants chair.

NCCF CEO tapped for Harvard program



Jennifer Tolle Whiteside, president and CEO of NCCF (center), recently was honored to be selected to attend a special four-day program for nonprofit leaders at Harvard's Kennedy School of Executive Education. The seminar was entitled Performance Measurement for Effective Management of Nonprofit Organizations and was attended by nonprofit leaders from throughout the world, including several from the Triangle.

Editor's Note

The NCCF Affiliate Impact Committee established the *Blueprint for Success*, a roadmap for affiliates to create localized plans for strategic growth. Our regional affiliates are busy implementing individualized plans as a part of the *Blueprint*, as outlined below. For a detailed update on the *Blueprint for Success*, see page 5.

Western

Regional Associate Sue LeLievre reports that affiliates in her region are working to forge stronger relationships with local nonprofits through targeted outreach and site visits. The **Clay County Community Foundation**, the **Macon County Community Foundation** and the **Madison County Com-**

munity Foundation have hosted events targeting part-time residents to raise awareness of community needs. **Macon County** is focused on efforts to raise awareness about childhood hunger. The **Swain County Community Foundation** hosted an event at a local business highlighting endowment building and the power of philanthropy. The **Haywood County Community Foundation** is focused on developing new leadership and connecting with local nonprofits while board members from the **Jackson County Community Foundation** conducted grantee site visits, fostering connection with the community.



Toby Allman was honored recently for his extraordinary service to the Swain County Community Foundation board. He's been an integral part of the SCCF since his first term in 2002 and has served in every officer position during the past 12 years. Sue LeLievre, regional associate for the west, recently awarded him with a plaque to show our appreciation.

Northwestern

John Francis, regional associate, reports that the **Ashe County Community Foundation** facilitated outreach to a local women's club that resulted in the creation of three new endowments, thanks in part to the efforts of Regional Development Officer Megan Lynch Ellis. The **Unifour Foundation Fund**, a component of the **Catawba Valley Community Foundation**, just reached the milestone of granting \$3 million to nonprofits serving Alexander, Burke, Caldwell and Catawba counties over the past 16 years. This year alone, the Unifour Foundation awarded \$230,000 to local nonprofits, including its largest grant ever, to the Catawba Valley Community College Furniture Manufacturing Academy. (Visit our website to see a feature story on the Unifour Foundation Fund.) The **Watauga County Community Foundation** successfully awarded \$19,000 in grants this cycle and also reached a \$3 million milestone -- in total assets. The **Alleghany County Community Foundation** hosted a successful lunch and learn for local attorneys in an effort to raise awareness.



The Unifour Foundation Fund awarded \$230,000 to local nonprofits in 2015, including its largest grant ever to the Catawba Valley Community College (CVCC) Furniture Manufacturing Academy. Left to right: Nancy Fritz, Unifour grants committee; Chip Huffman, Unifour; John Francis, NCCF; and with the CVCC are President Dr. Garrett Hinshaw, Lori Price, Crystal Glenn and Jeff Neuville.

Northern Piedmont

Katie Crumpler, regional associate, reports that board members in her region are focusing on outreach in their communities. The **Granville County Community Foundation** is working to ensure strategic grantmaking by conducting comprehensive assessments of the most common needs in the county and encouraging local nonprofits to apply for grants. Board members have been further developing relationships with local nonprofits by attending past grantee events and publicizing grants programs. The **Johnston County Community Foundation** awarded three renewable scholarships this year: the Ernestine J. Williams, the Fred M. Parrish, Jr. and the Jefferson and Eva Sugg Scholarship. The Parrish Scholarship is starting strong, with the inaugural year awarding \$25,000 to one deserving student's undergraduate studies. The **Vance County Community Foundation** is working diligently to facilitate strategic board expansion and participate in local community leadership initiatives around youth development and education.



The Johnston County Community Foundation is honored to hold several significant scholarship endowments, two of which were awarded recently to deserving South Johnston High School students. Hunter Rhodes, left, won the Fred M. Parrish, Jr. Scholarship award, granting him \$25,000 for his four-year college career. Evan Raynor received one of the Ernestine J. Williams awards, granting \$12,000 for his four-year college career. Scholarships are an important niche for NCCF, with about 150 active scholarships under our administration for the 2015-16 academic year.

Sandhills

Regional Associate Mary Anne Howard reports that the **Montgomery County Community Foundation** continued its laudable practice of matching donors with nonprofit needs when its community grantmaking fund was depleted, minimizing unmet requests. The **Hoke County Community Foundation** followed suit. Its local grantmaking effort was augmented with a gift from fundholder Mary Archie McNeill, whose endowment for music and the arts was awarded to benefit a local elementary school. The **Lee County Community Foundation** recognized retired teacher Virginia Hester and Dr. A. Dean Kesler with its annual Man and Woman of the Year Award, an event that garnered \$20,000 for the local grantmaking fund. The **Rockingham County Community Foundation** awarded outstanding student volunteers from all four county high schools, empowering the deserving students to contribute to the nonprofit organizations of their choice. The **Moore County Community Foundation** granted nearly \$100,000 last year and is gearing up for another grants cycle. The **Harnett County Community Foundation** awarded its annual Citizen of the Year honor to Dunn Mayor and founding Board Member Oscar Harris.

State of Generosity™

A sample of Foundation news about people and events across North Carolina

Sandhills (continued)



The Lee County Community Foundation honored Virginia Hester and Dr. A. Dean Kesler with its annual Man and Woman of the Year Award.



Rockingham County Community Foundation awarded outstanding student volunteers from all four county high schools and made contributions to the local nonprofits of their choice.

Coastal Plain North

Regional Associate Kelly Joyner Lee reports her region's affiliates are joyfully working through grantmaking season and that the area has been fortunate to participate in several activities related to the White House Strong Cities, Strong Communities program. The **Futrell-Mauldin Community Foundation for Greater Rocky Mount** hosted a Capacity Building Summit for Nonprofits in collaboration with the United Way, drawing in national caliber speakers. The **Warren County Community Foundation** facilitated a workshop for grantseekers and the **Wilson County Community Foundation** has been conducting past grantee site visits, including one stop at a local soup kitchen. The **Edgecombe Charitable Foundation** awarded four scholarships on behalf of fundholders, including one from Mary Ferebee Howard that focuses on students who will come back and contribute to the local community upon college graduation.



The Tar River Food and Wine Festival is a biennial event that benefits grantmaking in the Greater Rocky Mount area through the Futrell-Mauldin Community Foundation. Since the inaugural event in 2004, this effort has earned more than \$250,000 for local grantmaking. (KJ Bradley Photography).



The Coastal Plain North Region has participated in several activities related to the White House's Strong Cities, Strong Communities (SC2) program. The region will benefit from having David Glasgow in the area to assist communities with fostering effective collaborations. He visited our Edgecombe Charitable Foundation's grants gathering in Tarboro earlier this summer.

Coastal Plain South

Kim Smith Ball, regional associate, reports affiliates have been working on donor engagement, awareness and developing fresh community leadership with regional diversity. The **Carteret Community Foundation** hosted the annual Golfing for Grants event, raising more than \$14,000, with special credit due to Jimmy Mercer, the board's dynamic golf tournament chair. The **Greene County Community Foundation** is focused on raising visibility and awareness. A recent event highlighted the power of endowments, attended by NCCF Vice President of Development Beth Boney Jenkins at Cutter Creek Golf Club. The **Craven County Community Foundation** has completed its grantmaking season and will award an impressive \$115,000.



The board of advisors of the Greene County Community Foundation hosted a friend-raiser earlier this year to raise awareness about the "power of endowment," its work and local community grantmaking programs.

Northeastern

Regional Associate Natalie Jenkins Peel happily reports the northeast region's six affiliates representing 13 counties have been working diligently to cultivate new board members in an effort to better reflect the communities served. The **Bertie-Hertford Community Foundation** has been instrumental in the creation of a new nonprofit organization, YouthBertie. Board members Karen Ray and Ron Wesson have been actively involved in convening faith based organizations and other area food pantries to provide backpack programs to school-aged children facing hunger in one of the most food insecure areas of the nation. The **Martin County Community Foundation** successfully completed a needs assessment of its

local community, with newly elected Board Chair Susan Dunlow and member Marty Katherine Saunders conducting outreach to community leaders and nonprofit organizations in order to foster effective grantmaking. The **Chowan Community Funds Foundation** recently hosted a friend-raiser and breakfast, with Board Member Katharine Farless opening her home to community members and NCCF Philanthropy Counsel Mary Morgan, who spoke on the ways the county can benefit from permanent endowments.



The Chowan Community Funds Foundation hosted a reception in Edenton, where eight local nonprofits received grants totaling \$12,000. NCCF Statewide Board Member Laura Beasley talked to the group about the power of endowment.

Southeastern

Regional Associate Angie Brewer has been settling into her new role well, and reports that affiliates have been focused on ensuring strategic giving. The **Brunswick County Community Foundation** is digging deep into their community's needs by leveraging data. The board is also focusing on effective grantmaking, ensuring that funding decisions are based on research of community needs. The **New Hanover County Community Foundation** recently saw record grantmaking, awarding more than \$50,000, a new milestone. The **Columbus County Community Foundation** has been striving to raise awareness through board member presentations in the community while the **Onslow Caring Communities Foundation** has been collaborating with local nonprofits on trainings that focus on capacity building.



Cindy Cheatham, a member of the Brunswick County Community Foundation board of advisors, presented a check to the Brunswick Family Assistance Agency, Inc. for the emergency food pantry.



Many of our affiliates host grant-seeker workshops to acquaint nonprofits with our community grantmaking program and our online system. The Columbus County Community Foundation hosted a workshop this spring, and Board President Geoff Hopkins addressed the group.

Affiliate boards making progress with Blueprint for Success

Two years ago the North Carolina Community Foundation embarked on an ambitious plan to examine how we could best leverage our state-wide network of affiliates to ensure our continued success.

With one of the largest networks in the country, this effort has been no small feat for the Foundation, according to NCCF CEO and President Jennifer Tolle Whiteside. “Our extensive network is a differentiator and key to our mission to ensure that philanthropy is accessible to all,” she said. “It is both our responsibility and our privilege to help shepherd these resources across North Carolina.”

The effort has been led by the Affiliate Impact Committee, which represents staff, affiliate leaders and statewide board members. The result of the committee’s work is a plan called the “Blueprint for Success,” which provides a strategy that affiliate boards can tailor to help enhance their local foundations’ effectiveness.

The Blueprint identifies four major categories as key to affiliate work:

- Developing strong boards reflective of the local communities we serve
- Inspiring and growing local philanthropy to grow affiliate assets and a local “family of funds”
- Leveraging grants for maximum impact
- Positioning affiliate leadership as catalysts to meet community needs.

Affiliate boards have assessed their strengths and opportunities in each of these four areas, an exercise that has guided their selection to focus on in each category. The approach allows affiliates to develop plans specific to their boards’ and local communities’ needs and opportunities.

Much progress is being made, according to Sally Migliore, NCCF’s director of community leadership. “We are so gratified by how our affiliate boards have embraced this work,” she said.

The board of advisors of the Macon County Community Foundation (MCCF) has decided to focus on childhood hunger as a way to position their affiliate as a catalyst to meet community

needs. “This goal emerged when our board chair (Regina Lupoli) overheard a conversation at a local restaurant to the effect that ‘there were no hungry children in the Highlands area,’” said Sue LeLievre, NCCF regional associate for the west. Lupoli knew this wasn’t true, but also realized that many seasonal residents have limited experience in the county.

Lupoli then suggested that the board tackle this misconception as part of its Blueprint work. The MCCF board now has several ideas to raise awareness “that kids *are* hungry in Highlands,” LeLievre said. They plan to tap into local media outlets, with board members preparing PSAs and also serving as guests on a local radio station. More strategies are in development. Their efforts also will help them to make grantmaking decisions that align with this issue. The board is meeting with several nonprofits and government agencies that address food insecurities in the western part of the state so that they can educate themselves fully on the issue.

The Martin County Community Foundation also is focusing on leveraging local grantmaking efforts. This affiliate is new to making grants, having just embarked on the process last year. The board recently heard an update from their very first grantee, a summer youth tutorial program offered through Unlimited Care in Williamston. “The program reached more than 50 students over the summer, so this really illustrated how the affiliate can make an impact in the local community,” said Natalie Jenkins Peel, NCCF regional associate for the northeast.

The Wilkes Community Foundation is promoting local philanthropy and growing its “family of funds” through several strategies. A meeting set up by Board President Dennis Huggins with his personal wealth advisor and NCCF regional staff sparked the inclusion of the WCF on a recent economic forecast program for about 70 financial advisors and their clients, according to John Francis, NCCF’s regional associate for the northwest. Megan Lynch Ellis, NCCF’s gift and development specialist, made a presentation about charitable giving, establish-



Members of the Lee County Community Foundation board recently discussed their work on the Blueprint. The board will collaborate with the United Way on local needs assessment. L-R are LCCF board members John Ramsperger, Sharon Spence, Linda Smith and Jan Hayes, who also is executive director of the Lee County United Way.

ing endowments and the affiliate’s work. “Dennis’ great suggestion allowed us to highlight our work and value to an important audience,” Francis said.

The Blueprint for Success will have a long shelf life, according to Migliore. “We see the work as ongoing, with the Blueprint helping affiliates to set a course for their work for the foreseeable future,” she said. “Boards will either choose new goals within each category or they will refine what they’re already doing.”

Migliore pointed out that new tools and training are being developed to help affiliate boards accomplish their goals. “It’s important to note that NCCF’s support of the work of our affiliate advisory boards will be ongoing as well,” she said.

Tolle Whiteside said the Blueprint for Success provides an “over-arching framework” for our affiliates’ direction and how the staff can partner to support. “The Blueprint helps us to articulate our direction for all of our local foundations so that we can move together to leverage NCCF’s impact across North Carolina,” she said.

Agency funds should be part of your nonprofit’s strategy

NCCF is proud to administer agency funds for hundreds of nonprofits throughout North Carolina. “This speaks so well of the sector’s trust in the North Carolina Community Foundation,” said Beth Boney Jenkins, vice president of development. “These organizations are entrusting their future in some respects to us, and we are so honored to steward these funds.”

Agency funds are those endowments that nonprofits establish to ensure a steady, never-ending stream of income to support and strengthen their work. These funds are established to grow over time, returning an ever-increasing amount to the organization as a reliable source of additional, annual income.

The value of a permanent source of income cannot be underestimated, according to Jenkins. “We believe that an endowment can transform a nonprofit,” she said. “It indicates a nonprofit that is strategic and serious about its future, with concrete plans for the long-term.”

Some donors will not consider gifts to nonprofits unless an agency endowment is in place. “It demonstrates a commitment to fiscal responsibility and financial stability,” Jenkins said. “This is a litmus test for many major funders.”

The presence of an endowment with NCCF was one reason that Darlene Brown chose to accept the position of executive director for the Craven



A Havelock High School student works on a project funded through a PIE grant. PIE ED Darlene Brown says holding an endowment with NCCF frees up her board and staff to focus on mission-critical work, like funding school programs.

County Partners in Education (PIE). “It absolutely was one of the driving factors,” she said. “It indicated to me that the organization and board were forward thinking and that Partners in Education was financially stable.”

There are many advantages to establishing an endowment through NCCF. No matter the size, the endowment will benefit from inclusion in NCCF’s investment pool, which is:

- Diversified

- Governed by our board and investment committee
- Protected by our Investment Policy (visit About us/Financial information on the website)
- Managed by professional consultants

This means that your board and staff will not require an investment committee to oversee your endowment, leaving your organization with more time to devote to your mission and programs. Administration of your fund means your organization will receive:

- Quarterly fund statements, with a full explanation of the performance of the endowment
- An annual pay-out with the option to re-invest
- Access to all information related to the management of your fund

An endowment with NCCF also means access to an array of additional professional support beyond our prudent investment management. This support can include but not be limited to:

- Marketing, including a tailored brochure, ideas and advice to promote your fund
- Administrative, which covers record-keeping and gift acknowledgments
- Access to planned giving expertise and strategies
- Capacity to work with more complicated gifts of stock and real estate

Continued on page 6

Making grants (continued from page 1)

to ensure our sector’s capacity to meet the needs of our communities,” she said. “That includes making sure that nonprofits serving our communities are making investments in their abilities to deliver, and those investments include focusing on staff training, infrastructure, development,” she said. “These are not expenses to be kept as low as possible if we want to ensure the optimum performance that we need now – and in the days ahead.”

*Agency representatives in North Carolina who attended a NC Center for Nonprofits conference a couple of years ago had the privilege of hearing Pollotta, whose “Ted Talk” on the same subject is a popular YouTube download. Pollotta is an author, consultant, speaker and founder and Chief Humanity Officer of Advertising for Humanity, a full-service brand and inspiration agency for the humanitarian sector.

Blended gifts (continued from page 1)

- The other charity is made the beneficiary of the retirement account.
- Finally, Muriel bequeaths her home and remaining property to the NCCF to establish a designated endowment to provide for long-term facility maintenance needs of both charities. The endowment will be funded upon the settlement of Muriel’s estate.

Through a blended gift of current, major and deferred gifts, Muriel has provided for the immediate needs of her favorite charities, effectively deployed unproductive assets, and established a testamentary endowment to support long-term needs.

CONCLUSION

Are blended gifts heralding a new Bronze Age for philanthropy? Surely like the ancient Sumerians we are discovering that combined approaches can produce even stronger results. Using components customized to each situation can help every donor maximize his giving potential. Call us to discuss the most effective blend to meet your own charitable goals.

*Gift examples are for illustrative purposes to demonstrate the possibilities of blended gifts. They are not meant to substitute for advice from an individual’s professional advisor.

This article is by Beth Boney Jenkins, who can be reached at 919-828-4387 or bjenkins@nccommunityfoundation.org if you have questions about blended gifts.

Agency funds (continued from page 5)

Brown said she has found working with NCCF to be easy and reassuring. “The Foundation provides the checks and balances we might not be able to perform as a smaller nonprofit,” she said. She added that she can’t imagine leading a nonprofit without an endowment. “It’s like your own personal budget and financial strategy,” she said. “Of course you should pay yourself first, and that’s what an endowment can do for a nonprofit.”

Brown’s goal is to build the PIE endowment to \$1 million. “I believe so strongly in our mission, and I want to ensure that we deliver on that promise long after I’m gone from my leadership role,” she said.

Give now: Make a contribution to NCCF or any of our funds!

If you would like to make a contribution to the North Carolina Community Foundation or one of our funds, you may make your gift online at www.nccommunityfoundation.org, or download a form and mail your check or credit card information -- or submit your credit card information via fax at 919-828-5495.

While on our website, we invite you to review our list of funds if you are looking for the right recipient for your charitable objectives, a meaningful tribute, memorial or anniversary or birthday gift.

NCCF Board of Directors

Executive Committee

Linda J. Staunch, *Chair, Raleigh*
James Bell Black, III, *Vice Chair of Board; Chair, Governance, Raleigh*
Dean E. Painter, Jr., *Secretary, Raleigh*
Robert L. Jones, *Assistant Secretary, Raleigh*
W. Trent Ragland, III, *Treasurer, Raleigh*
Rodney E. Martin, *Chair, Grants, Swansboro*
Kenneth G. Reece, *Chair, Resource Development, Raleigh*
Stuart B. Dorsett, *Immediate Past Chair, Raleigh*

Board Members

Juan Austin, *Jamestown*
Robert E. Barnhill, Jr., *Tarboro*
Laura M. Beasley, *Colerain*
Brian C. Crutchfield, *Boone*
Alexander (Alex) Graham Floyd, *Granville County and Raleigh*
Sarah Belk Gambrell, *Charlotte*
Frank B. Gibson, Jr., *Wilmington*
Katharine (Kack) Harrison Hardin, *Rock Hill, SC*
Clyde P. Harris, Jr., *Wilson*
H. Kel Landis, III, *Raleigh*
James W. Narron, *Smithfield*
James M. Parrott, Jr., *Kinston*
Karen Stiwwinter, *Franklin*
Steven Wangerin, *Jacksonville*
Elizabeth Hobgood Wellons, *Smithfield*

Directors Emeriti:

Annabelle L. Fetterman, *Clinton*
Henry E. Frye, *Greensboro*
Charles W. Gaddy*
Martha Guy, *Newland*
Lewis R. Holding*
The Honorable James E. Holshouser, Jr.*
John R. Jordan, Jr., *Raleigh*
W. Trent Ragland, Jr.*
The Honorable Robert W. Scott*
Sherwood H. Smith, Jr., *Raleigh*
Billy T. Woodard, *Fuquay-Varina*
* Deceased

NCCF Staff

Headquarters & Raleigh-based associates
4601 Six Forks Road, Suite 524
Raleigh, NC 27609
Phone: 919-828-4387; Fax: 919-828-5495
Unless noted, all email addresses are first initial last name@nccommunityfoundation.org

Executive

Jennifer Tolle Whiteside, *President and CEO*
jtwhiteside@nccommunityfoundation.org
Cherry Ballard, *Assistant to the President*

Development

Beth Boney Jenkins, *Vice President*
Megan Lynch Ellis, *Regional Development Officer (Serving the Western and North-western regions)*
PO Box 524, Boone, NC 28607
Phone: 828-773-6290
Mary Morgan, *Philanthropy Counsel*
Melinda Allen, *Gift and Development Specialist*

Finance

David Ryan, *Chief Financial Officer*
John Hartley, *Director of Finance and Chief Investment Officer*
Rhonda Daly, *Controller*
D’Wayne Wilkins, *Manager of Information Services*
Lisa Meeks, *Sr. Accounting Associate*

Grants and Scholarships

Leslie Ann Jackson, *Director of Grants and Scholarships*
ljackson@nccommunityfoundation.org
Anna Conway, *Grants and Scholarships Specialist*
Brittaney Rea, *Grants and Scholarships Specialist*

Marketing and Communications

Noël McLaughlin, *Director of Marketing and Communications*
Louis Duke, *Communications Specialist*
Lori Johnson, *Communications Assistant and Office Manager*

Community Leadership Team

Sally Migliore, *Director of Community Leadership*

Affiliates

Western Office (Cherokee, Clay, Eastern Band of Cherokee, Graham, Haywood, Jackson, Macon, Madison and Swain)
Sue LeLievre, *Regional Associate*
PO Box 1396
Franklin, NC 28734
Phone: 800-201-9532 (toll-free)

Northwestern Office (Alleghany, Ashe, Avery, Catawba Valley, which includes Alexander, Caldwell and Catawba counties; Mount Airy, Watauga, Wilkes and Yadkin)
John Francis, *Regional Associate*
Lylerly House
310 N. Center Street
Hickory, NC 28601
Mailing: P.O. Box 2851, Hickory, NC 28603
Phone: 336-745-1739

Northern Piedmont Office (Cary, Franklin, Granville, Johnston, Person, Vance and Wake)
Katie B. Crumpler, *Regional Associate Raleigh*

Sandhills Office (Harnett, Hoke, Lee, Montgomery, Moore, Randolph and Rockingham)
Mary Anne Howard, *Regional Associate Raleigh*

Southeastern Office (Brunswick, Columbus, Duplin, New Hanover, Onslow, Pender, Robeson and Sampson)
Angie Brewer, *Regional Associate*
1213 Culbreth Drive
Wilmington, NC 28405
Mail: PO Box 991, Wilmington, NC 28402
Phone: 910-509-7256
Fax: 910-256-0630

Coastal Plain North (Edgecombe, Halifax, Nash, Northampton, Rocky Mount, Warren, Wayne and Wilson)
Kelly Joyner Lee, *Regional Associate*
PO Box 7394
Rocky Mount, NC 27804
Phone: 252-245-1794

Coastal Plain South (Carteret, Craven, Greene, Jones, Lenoir, Pamlico and Pitt)
Kim Ball, *Regional Associate*
PO Box 3411
New Bern, NC 28564
Phone: 252-288-5706

Northeastern Office (Beaufort-Hyde, Bertie-Hertford, Chowan, Currituck-Dare, Martin and Northern Albemarle, which includes Camden, Gates, Pasquotank and Perquimans)
Natalie Jenkins Peel, *Regional Associate*
204 South Poindexter Street
Elizabeth City, NC 27909
Phone: 252-216-8908

Visit nccommunityfoundation.org and click on **Affiliates** to use an online statewide map to locate affiliate foundations in 67 counties across North Carolina.