



“Funding our Rural Future” can help philanthropy flourish

The aging “Baby Boom” generation has increased awareness of the “transfer of wealth” that will pass historic-level sums across generations over the next several decades. Boston College, which has studied the impact of inheritance within the context of philanthropy, estimates that \$41 trillion will have transferred over the 55-year period that began in 1998 and will conclude around 2052.

The story’s potential in North Carolina has been thoroughly explored by NCCF and a team at the NC Rural Economic Center, which commissioned an in-depth analysis of the wealth transfer’s impact on our state’s 85 rural counties (defined as 250 people or fewer per square mile). The Rural Center’s Jason Gray, director of research and innovation, and Senior Vice President Elaine Matthews, oversaw the research team that analyzed the data. NCCF’s CEO Jennifer Tolle Whiteside served on the technical advisory committee.

Gray has presented findings to a number of audiences across the state, including NCCF’s board and staff. He joined NCCF team members to discuss the wealth transfer issue



with affiliate foundation constituents and other community leaders in seven western-area counties late last year. Additional county and regional meetings are planned for 2011.

Key findings from the “Funding our Rural Future” report include:

- North Carolina began a significant transfer of wealth last year that continues now.
- The projected net worth of all rural households in our state is about \$322 billion.

- Over the next decade, an estimated \$78 billion will be available to transfer between generations in rural families. Over the next two decades, that transfer opportunity swells to nearly \$186 billion.

- If just five percent of the 10-year transfer opportunity were captured by local nonprofits, including community foundations, our state’s rural counties could receive nearly \$4 billion to reinvest locally. In 20 years, that same five percent capture could exceed \$9 billion.

The report even applied the transfer to a foundation endowment model: “Using a conservative five percent annual rate of return on the endowments this capture might build, approximately \$195 million would be generated over the next 10 years to support community economic development and other charitable investments. Over 20 years, approximately \$465 million would be generated.”

While the research helps to create understanding of the transfer opportunities facing the state’s rural counties, Gray pointed out that the

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The Carteret Community Foundation enjoys nearly 30 years of success

Carteret Community Foundation had reached the milestone of its 21st year when its advisory board voted to affiliate with the North Carolina Community Foundation.

The year was 2005, and the board decided that it could eliminate “the overhead of offices, legal and accounting fees, audits and data base management,” according to a letter from President Tim Bradford. “Our board can now focus on expanding charitable endowment dollars that will benefit the entire county,” he said.

And focus they have! Fast forward to 2011, and the Carteret Community Foundation has granted about \$500,000 to local nonprofits since it joined forces with NCCF. The affiliate now boasts 17 endowments and a disaster relief fund in partnership with the Department of Social Services. The group also supports local students through nine scholarship funds, among the largest number held by an NCCF affiliate.

Current President Susan Sullivan’s enthusiasm about the affiliate foundation’s work is indicative of a board that remains vibrant and in-tune with community needs. Though she was quick to credit her colleagues for the Carteret Community Foundation’s continued success, it’s obvious that the affiliate has benefitted from strong leadership at the helm. “I would say our strengths are positive energy and a mix of different backgrounds,” she said. “We have deliberately and strategically selected our board members to complement each others’ talents and leadership styles.”

Effective local leadership is key to an affiliate foundation’s success, particularly during a recessionary economy. Carteret, like nearly every other community throughout our state and nation, continues to deal with its share of financial challenges.

The coastal community’s population shifts with the summer sands. While tourism reigns in this

county comprised of 11 separate municipalities and 26 unincorporated communities, there is no diverse industrial base that regularly feeds the economy in the off-season. Commercial fishing, though still a mainstay, is declining. Like many North Carolina communities, Carteret’s economy is in transition.

Patricia Lawler, NCCF’s regional associate who works with the Carteret affiliate, noted that this board is “very good” about identifying and responding to community needs. With nearly 70 area charitable organizations facing decreased revenues and increased demand, effective grant-making is essential. The Carteret affiliate has positioned itself as a strong local resource to help meet community needs.

Edie Reed is director of the Broad Street Clinic, which has received several grants from the Carteret Community Foundation over the years. Recent grants have helped the free health clinic purchase essential equipment that allows patients with chronic diseases to monitor their conditions at home. In the long run, she noted that this equipment leverages local resources by minimizing emergency room visits, which she called “the most expensive form of treatment available.”

Trish Slape, executive director of the Outer Banks Wildlife Shelter, praised the board’s grant-making process. “I believe they really investigate the needs presented to them and try to balance their responses so they can distribute help to as many different types of organizations as possible,” she said.

Regular nonprofit site visits help board members remain current. “These are eye-openers for our advisory board members,” Lawler said.

The Carteret board has also taken steps to increase the amount they can grant to local agencies through effective fund-raising. The group’s signature golf tournament will celebrate its 25th year this September. This event regularly nets about



With its scenic coastline, Carteret regularly appears among “best places to live” lists, but the county is not immune to the challenges facing many of our state’s rural communities.

\$12,000 for the grant-making fund. A recent appeal letter yielded one of the most impressive results ever reported by an affiliate’s direct-mail campaign. Sullivan said it was “the personal touch” that fueled the board’s success. “Everyone opened their address books, every board member signed and wrote notes on each letter, and follow-up was key,” she said. Checks are still arriving from the year-end effort, and donors are acknowledged on the affiliate’s page of NCCF’s website (nccommunityfoundation.org).

The Carteret board also goes out of its way to recognize outstanding efforts through its Volunteer

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NCCF activates Disaster Relief Fund



North Carolinians continue to show resilience, courage and strength in the face of adversity after a series of tornadoes ripped through our state, causing significant damage to both home and commerce.

Here at NCCF we were able to illustrate our flexibility and responsiveness through activation of our statewide Disaster Relief Fund. Under the leadership of Rodney Martin, chair of the NCCF Grants Committee, we quickly mobilized to raise much needed resources. We also partnered with our affiliate network leadership to ensure that funds reach the local organizations that could most effectively serve those most directly impacted.

Donations came in from across the state, the country and even the world. We would particularly like to acknowledge a generous gift from the Oak Foundation, which is based in Geneva and operates several international offices. The Oak Foundation commits its resources to address issues of global, social and environmental concerns, particularly those that have a major impact on the lives of the disadvantaged. I also would like to thank our statewide board, affiliate advisory board members and our staff for both their monetary support and their commitment to meeting the needs of the communities we serve.

One hundred percent of funds raised will be distributed, and we will not charge any administrative fees on these monies.

To date, more than \$65,000 has been allocated to eight affiliates to distribute locally, and we are in the process of awarding grants now. Bertie, Lee and Wilson received \$14,083 each, and Greene, Harnett, Johnston, Onslow and Wake received \$4,550. We will continue to allocate any funds received over the next several months.

There is a great need to share best-practices among our community foundation colleagues in other states, as this spring's storms have cut a huge and destructive swath. Many of us have planned a dialogue to discuss lessons gained from our respective efforts, and we will share relevant information with our affiliate networks.

Both the strength and value of our affiliate network were clearly illustrated once again through our work together to respond quickly, efficiently and fairly. We thank all involved for your teamwork, responsiveness and dedication to helping us meet our communities' needs.

Jennifer Tolle Whiteside
President and CEO
NCCF



This dramatic damage to a Wilson County business is but one sad example of the devastation experienced across eastern North Carolina in April.

Staff updates

In the past few months NCCF has welcomed two new staff members and moved another member of our team into a revamped role.

- Sally Migliore joined the staff in early March as the director of community leadership, a new position created to help leverage the Foundation's network of affiliates. She leads and coordinates a statewide team of professionals in all aspects of affiliate and donor services, scholarships and grantmaking.
- Jeff Grunewald also joined the NCCF staff in March as the manager of information services. He handles technology, information and data processing systems and oversees data services related to funds and grantmaking.
- Melinda Allen has been part of the NCCF staff since 2004 and recently transitioned to the development team as the gift and development specialist. In her new position she is responsible for development reports and the overall implementation of the gifts entry and acknowledgment process.



Assuming new roles with NCCF are, L-R: Jeff Grunewald, Sally Migliore and Melinda Allen.

Growing your funds

It's quite an achievement to establish an endowment, whether to help cement a nonprofit organization's future or a family's legacy.

Maybe you've saved to come up with the \$10,000 minimum to ensure operational expenses for your agency through an endowment. Perhaps you acquired \$25,000 to set up a scholarship in your family's name. Or your parents' planned-giving foresight resulted in a bequest to establish a fund. While starting the endowment is noteworthy, it should not be the end of activity if you want its impact to grow.

Whether you're an individual with a donor-advised fund, or you're shepherding an endowment for a nonprofit organization, there are some strategies that can help build your fund so that distributions can grow and truly make a difference, according to Beth Boney Jenkins, NCCF's vice president for development. "Both our development and marketing staffs are here to help you through advice, counsel on best-practices and tools that can assist your efforts," she said.

Nonprofit strategies

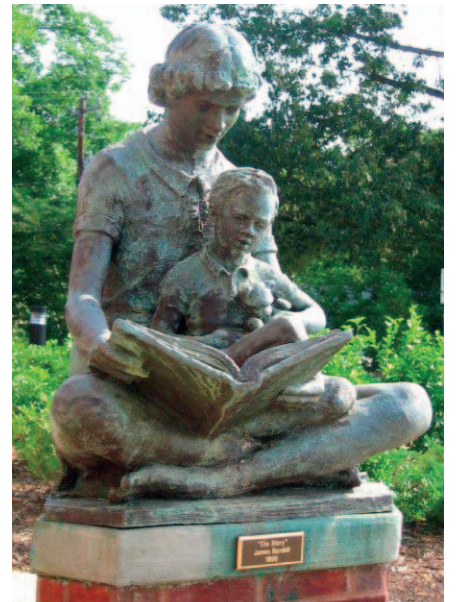
Board membership is dynamic and staff can change, so the endowment's purpose and even existence can sometimes get lost over time, said Leslie Stewart, regional development officer. "Make talk of the endowment a regular conversation with both your board and team," she recommended. Other strategies:

Designate certain types of gifts for the endowment. All memorial gifts, for example, can automatically go towards building your fund. These are perfect to earmark for an endowment because these contributions are unexpected and unbudgeted. Be sure to point out that memorials will be associated with the endowment in perpetuity, a concept that particularly lends itself to tribute gifts.

Your nonprofit may choose to **designate any budget overages at year's-end to the endowment.** Or better yet: **plan for a budget contribution** to your endowment every year that it's feasible. Through careful spending and good stewardship, NCCF was able to allocate a sum to its operational endowment in 2010. "It's a practice we'll continue whenever we can plan to allocate resources," said Jennifer Tolle Whiteside, NCCF president.

That's not to say that endowment growth should result only from unexpected sources. A **campaign established specifically for your endowment** is another recommendation. A set **percentage of all contributions** to your organization can also be directed toward the fund annually.

The NCCF also has many tools that can help you raise awareness about your endowment and increase its balance. A new **fund**



An effective appeals letter sent to a small but highly targeted list was successful for the Hickory Public Library, where this beautiful statue stands outside its main branch.

brochure template is available that can be tailored specifically for your campaign. A well-crafted **appeal letter sent to a targeted group** is another idea. Lists need not be huge. In fact, a small targeted list of engaged recipients will reap more benefits than a vast distribution to unknowns. The Hickory Public Library, for example, sent an appeal to a highly targeted "friends of" list of only 200 and brought in a healthy sum for the endowment fund, according to Stewart. "This effort also benefited from some personal follow-ups," she said. NCCF staff are happy to consult on your letter's content and distribution strategy.

Special fundraising events are another way to raise both additional resources for your fund and awareness about your organization. Be sure to weigh time and expenses invested against proceeds, as both can dilute the net contribution's value.

An endowment established for Swain County public schools has grown its corpus from \$5,000 in 2004 to \$250,000 today through a combination of these approaches and many more, according to Stephanie Treadway, the fund's board treasurer. The endowment awards scholarships and mini-grants to teachers, allowing them to recognize the value of the Swain County Public Schools Foundation Endowment. Payroll deduction makes it easy for school system employees to make gifts. And strategic alliances with other organizations and individuals have helped them to leverage their efforts. The endowment has benefited tremendously from two individuals who bicycled across country and paddled through our nation's rivers to raise funds for memorial tributes.

Remember to use your endowment as a differentiating point when promoting your nonprofit organization. The very fact that your agency has the vision and foresight to create

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State of Generosity™

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

MILESTONES

Twenty for twenty in Johnston County

The Johnston County Community Foundation celebrated its 20th anniversary with a gala celebration at the beautiful Smithfield home of Allen and Cissie Wellons. Cissie is a member of NCCF's statewide board and a former member of the JCCF advisory board. The Wellons home was bursting with many well-wishers who are or have been associated with the affiliate for the more than two decades it has served as a resource for Johnston County. NCCF Board Chair James W. Narron, of Smithfield, was on hand for remarks, firing up the crowd on the value of a local community foundation. The JCCF has awarded close to \$250,000 in community grants to local programs since its inception. Also present was JCCF's first and founding President Ramona Cash, who served the affiliate in that capacity for half of its existence. Ramona also was the first recipient of the NCCF's prestigious Lewis R. Holding Award for exemplary leadership. Current JCCF President Betsy G. Whittington and the board set the goal of raising \$20,000 to commemorate the local foundation's 20 years of serving area needs. The goal was handily met, with many thanks to event sponsors, which are listed on the Johnston County affiliate page of NCCF's website at nccommunityfoundation.org. This money will provide a valuable boost to the local grant-making fund.



A crowd of well-wishers and friends of the JCCF attended the celebration of the affiliate's two decades in Johnston County. Visit NCCF's Flickr feed, linked from our website (nccommunityfoundation.org) to see a gallery of more event photographs.

Unifour to award grants in Catawba Valley area

The Unifour Endowment's grants committee met recently in Hickory to review 49 applications and decided to award \$200,000 to a number of nonprofit organizations, including a homeless shelter, a new food bank and programs related to crisis assistance, women and children, literacy, museums, an archeological dig and many other important needs and causes. Grant recipients will be recognized in June at an annual awards reception. To date the Unifour Endowment has awarded more than \$2.4 million in community grants.

New women's giving program established in northeast

Women from Currituck and Dare counties have formed a new giving circle, sponsored by the Currituck-Dare Community Foundation. As with most women's giving programs established through NCCF, the Currituck-Dare Women's Fund is focused on the needs of women and children. Some participants travel quite a distance to attend programs in this sparsely populated northeastern corner of North Carolina. The latest women's giving program is one of six women's funds begun and supported by NCCF, including

the Women Givers of Northeast North Carolina, the Bertie-Hertford Women's Fund, the Women Givers of Nash-Rocky Mount, the Wake County Women's Giving Network and The Art of Giving, which is in collaboration with Triangle Community Foundation. We also sponsor the Statewide Women's Fund.



The historic occasion of the very first meeting of the Currituck-Dare Women's Fund was marked by a special dinner.

Moore County endowment honors grandmother

The Ann Taylor Hinton Endowment for Multiple Sclerosis was established with the Moore County Community Foundation to memorialize a beloved mother and grandmother whose nickname, Honey, was as sweet as her disposition. Despite being diagnosed with multiple sclerosis in her early years, Honey led a full life until she passed away in 2006. Her granddaughter, Aubrey Hinton, was inspired by Honey's ability to bring a "shimmer of happiness" to everyone she encountered. To eternalize that shimmer and her grandmother's memory, she founded "My Honey Corner," an online boutique featuring her handmade jewelry. Aubrey creates copper and sterling bracelets with the phrase "Sweet as Honey" to remind everyone to pass along the kindness, happiness, encouragement and "sweetness" that Honey embodied. Proceeds from the bracelets, available at myhoneycorner.com, are donated to the endowment, which supports the National Multiple Sclerosis Society.

MAKING A DIFFERENCE

Greenhouse effectiveness in Macon

Macon Early College High School was the happy recipient of a donated greenhouse, but funds were needed to disassemble, move and reassemble the structure on campus. A grant from the Macon County Community Foundation has helped to accomplish this, and volunteers from throughout the county joined students, their parents and faculty to install the structure.



Volunteers joined students to help assemble the donated greenhouse on campus.

Chabad Learning Center sets up fund in Cary

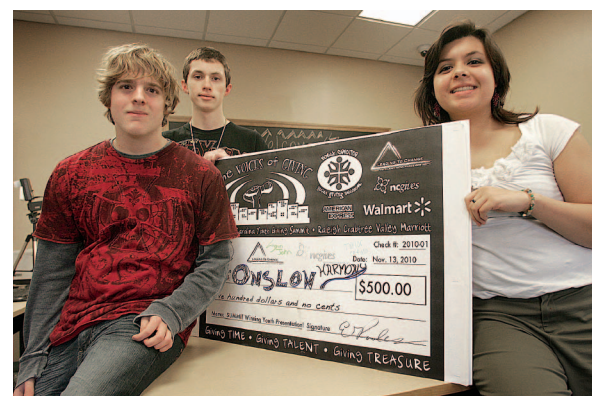
The Chabad of Cary Learning Center recently established an operating endowment with the Cary Community Foundation. The fund was created to provide ongoing support of the Center, which was established about ten years ago. Chabad is an educational organization dedicated to helping people, regardless of background, affiliation or personal observance, increase their level of Jewish knowledge.



Rabbi Aaron Herman shows off his juggling skills at this spring's Purim festival at Chabad Learning Center in Cary.

Onslow's youth group builds community

HARMONY, which stands for Helping All Reach More Options through New Youth Givers, is an NCCF program supported by the Onslow Caring Communities Foundation that teaches young people about philanthropy. The Jacksonville-area youth board looks for community projects that have a positive impact on Onslow County youth. The group gathers monthly to discuss ways to improve the community and provides grants for local programs that will help those efforts. HARMONY is one of seven youth-giving programs that NCCF has helped to launch across North Carolina.



Jacksonville HARMONY members L-R: Taylor Cefalo, Talyn Detmers and Miriam Ratte were among high school students from Onslow area schools who designed an award-winning program on diversity. (Photo by Chuck Beckley and used with permission from The Jacksonville Daily News)

Duplin fund is on its way

When the door to supporting Boys and Girls Club programs in Duplin County closed, the window to the Duplin Foundation for Youth Advancement opened. Organizers of the annual Sheriff's Ball had been raising money for years to keep local Boys and Girls Clubs operating. But it was becoming increasingly difficult to annually raise the nearly \$260,000 to support the clubs. The idea to establish an endowment fund to support youth programs was born, and the group raised more than half of the necessary seed money in less than two weeks! The group is well on its way to establishing the fund to support nonprofit organizations

State of Generosity™

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

that serve Duplin County youth, and members hope to inspire citizens to make additional contributions to the endowment. Local citizens, including the Duplin County sheriff and members of the Duplin County Community Foundation advisory board, will serve on the committee to review applications and recommend grant awards.

Signs of generosity in Swain

Never underestimate the power of signage – or generous hearts! Swain County didn't have a United Way or even a campaign to provide a "community chest" for local nonprofits. The Swain County Community Foundation stepped up to establish and operate an annual Gift Fund to serve area nonprofit programs in this capacity several years ago. The gift fund's total has increased steadily over the last few years. But a recessionary economy has challenged us all. And this year's effort was not quite up to the established goal, which was painted on a giant red sign posted in the middle of Bryson City. A generous couple driving through town spotted the sign and noticed the gap between the campaign's \$40,000 goal and how much had actually been raised and submitted the remaining \$4,000 amount required to achieve the desired total. The couple called the donation their "Christmas present to each other." And we'll add: to the entire community!



Ann Marie Wright (left) and Christine Colcord were happy to report that the Swain County Gift Fund met its 2011 \$40,000 goal. Ann Marie chairs the United Gift Fund and just rotated off the Swain affiliate board. Christine currently serves as vice president of the board.

TRIO program promotes success in Watauga

Board members of Watauga County Community Foundation recently conducted site visits that included a meeting with participants of TRIO, a federal program and grantee partner that promotes opportunity through education, with the goal of ensuring that middle- and high-school students are prepared for – and attend college. TRIO encourages success through a number of programs, including diversity and global issues, community leadership and honing study skills necessary for post-secondary education success.



Boone area TRIO participants, L-R: Diane Mazza, TRIO academic specialist at the Watauga Campus of Caldwell Community College; Derrick Bond, student; and Alice Lentz, TRIO director.

HAPPENINGS

Bunny pays visit to Jones County

The "biggest Easter egg hunt in Maysville" occurred recently at Frost Park, which is supported in part through an endowment established with the Jones County Community Foundation. Usage of the park has increased dramatically since recent improvements have helped to make it a favorite local amenity. "The park has become a selling point for our town, a sign of what is good about living in Maysville," said Dan Ryan, Jones affiliate board member.



Frost Park has become a popular gathering place in Jones County.

Duck & Wine Festival another success

More than \$9,000 was raised at the third annual Duck & Wine Festival for the Currituck-Dare affiliate's community fund and our charitable partners: the Network for Endangered Sea Turtles, Friends of Jockey's Ridge and Currituck Kids. This was the sell-out event's third year, with nearly 600 in attendance. Mark your calendar for this popular event next year: April 28, 2012.



Volunteers help to make this event, held on the boardwalk at the Waterfront Shops in Duck, a huge success every year.

Advisors hosted in Harnett

The Harnett County Community Foundation hosted an event for professional advisors at the picturesque farm of Dal Snipes, a member of the local advisory board. Included among guests of local attorneys and CPAs were former U.S. Senator Robert Morgan and his wife, Katie, who live in the area. The Senator, a member of the Harnett affiliate's advisory board, was introduced by his daughter, Mary Morgan, who serves NCCF as philanthropy counsel. Mary spoke about how the NCCF can partner with professional advisors to help them extend their practices by serving their clients' philanthropic and tax needs. She noted that funds established with the NCCF can serve both clients and also benefit the community. She and her father talked about the huge impact that the Henderson D. Mabe, Jr. Endowment Fund has had on the future of Harnett County youth. The endowment has so far awarded more than \$350,000 in scholarships to local high school graduates pursuing careers in medicine.

Tar River Wine Festival benefits community

The Futrell-Mauldin Community Foundation for Greater Rocky Mount sponsored the fifth biennial Tar River Wine Festival in April to raise money for charitable organizations in Nash and Edgecombe counties. The event has become one of the preeminent charitable events in eastern North Carolina and is held at the beautiful Rose Hill Conference Center in Nashville. The festival featured an elegant evening of food, wine and music. The primary fundraiser for the Futrell-Mauldin Community Foundation did not disappoint this year. About \$38,000 was raised to fund community projects. More than 20 restaurants and wineries donate to the festival. The next Festival comes around in 2013!



L-R are Bob Mauldin, immediate past president of the Futrell-Mauldin Community Foundation board, and members of the Tar River Wine Festival planning committee: Beth Turnage, Annie Daughtridge, Pat Mauldin, Kara Cox, Sally Adams, Emily Bondy, Rebecca Hough and Heather Freeman.

CEO hosts Community Conversations

NCCF's CEO Jennifer Tolle Whiteside hosted "Community Conversations" in two of our affiliate areas in May. A broad representation of Rockingham County fund-holders, donors and affiliate advisory board members attended the event held in Madison. Topics ranged from NCCF's recently activated Disaster Relief Fund to the challenges facing such a large and geographically diverse county like Rockingham. Jennifer shared that the depth of NCCF's work stems from our partnership with communities across North Carolina. Another event was hosted in the Hoke County town of Raeford and attended by fund-holders, fund advisors and board members. This group talked about planned giving and opportunities to work with professional advisors.

Jennifer hosts a number of these events throughout the state to hear what our constituents have to say about their work and how the NCCF can best serve their needs to leverage effectiveness.



Jennifer Tolle Whiteside, NCCF's president and CEO, talks with a group from Hoke County over a recent lunch and "Community Conversation."

Grantee's generosity helps Moore affiliate do more

One of our core services at the NCCF is to help the charitably minded set up funds, often to honor other people. It's an unusual turn of events for a grantee partner to establish an endowment to honor our affiliate's work.

The Moore County Community Foundation (MCCF) was the grateful recipient of such a generous gesture when St. Joseph of the Pines recently established an endowment. St. Joseph of the Pines, a member of Catholic Health East, is a non-profit devoted to senior living and health services that has become synonymous with excellence in care, not only in Moore County, but up and down the Eastern Seaboard from Maine to Florida.

Kelly Patterson, CFO, said members of St. Joseph's board and staff heard a presentation from MCCF Chair Hugh Bingham on the purpose of a community foundation and the value of endowed funds. The group was impressed with the affiliate's work in Moore County, but noticed that funds held with the MCCF were largely restricted, with defined intents that supported good causes but were nonetheless limited.

"We wanted to give a gift and leave it open," Patterson said. "We were familiar with the community and its differing needs, and we know that communities don't stay the same."



Hugh Bingham

Patterson also said it is St. Joseph's ongoing mission to support the community, particularly the needs of the poor and infirm. This is a tradition begun by the Sisters of Providence, an order of Catholic nuns that has sponsored Moore County and other Catholic Health East facilities for more than 130 years. While the order has diminished and the nuns aren't as visible as they once were, their legacy lives on throughout the communities they served. St. Joseph's lay leadership works hard to honor the order's vision and values. A visit to the organization's website (www.sjp.org) shows a long list of local nonprofit initiatives and worthy causes supported by St. Joseph of the



Pines in Moore County.

Bingham said the endowment from the organization couldn't have come at a better time. "The way they structured the gift allows the Moore County Community Foundation to add to our unrestricted fund and give where the needs are greatest," he said.

And needs continue to be great in this Sandhills region, Bingham said. "There are still a lot of people having a hard time who need help with basic needs," he said. "The endowment from St. Joseph of the Pines has allowed us to increase our community grants program significantly." He said St. Joseph's also has plans to continue to grow the endowment.

Bingham said the size of community grants increased about 40 percent last year due to St. Joseph's gift and through the generosity of another local benefactor, Penny Enroth, who also set up an unrestricted endowment with the MCCF.

"We have an outstanding community in Moore County," Bingham said. "It's truly an honor to serve this area where so many people and organizations share such a special sense of responsibility."

St. Joseph's mission is to support the community, a tradition begun by the Sisters of Providence, an order of Catholic nuns that has sponsored Moore County and other Catholic Health East facilities for more than 130 years.

Grants update: so far so good online!

NCCF is about mid-way through the community grants process, and the online grantmaking tool the Foundation introduced in mid-February has met much success since its launch.

NCCF staff members have held training workshops throughout the state as part of the effort to familiarize agencies and affiliate grants committees with the new online process. A recent joint training session between the Futrell-Mauldin Community Foundation for Greater Rocky Mount and the Edgecombe Charitable Foundation had particularly encouraging results, with 23 nonprofits in attendance, according to Kelly Lee, regional associate.

The process is popular with nonprofit organizations; more than 200 agencies registered with the online system in the first month. Benefits of the online system include reduced paperwork and decreased expense for nonprofits.

The online grantmaking system has also been well received by grant committees, according to Lee. "This system is more streamlined," she said. "It's a much easier process for them to review applications and share with other committee members."

In addition to grantwriting workshops, NCCF provides several tools for a seamless transition to the online application and review processes. Staff is available to lead both applicants and grant committees through any questions. There is also an instructional video offered by NCCF on YouTube, which is linked from our website (nc-communityfoundation.org).

Lee looks forward to the long-term results of the transition to online grantmaking. "I'm excited to see how it grows the number of applicants we have," she said.

Last year the NCCF processed a record number of grants, with about \$5.8 million of scholarships, community and donor-advised grants being awarded to 2,000 recipients. Of that, about \$500,000 were community grants awarded through our affiliate foundation partners.

Funding our Rural Future

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numbers are conservative estimates. When questioned about the validity of the transfer sums, he noted that the dollars actually trend toward the low side.

Besides, identifying the exact dollar amount is not the point. Gray noted that it's unlikely that this level of financial wealth will transfer again. For rural communities this is particularly critical if the younger generation moves away to seek work elsewhere. "The farm or business passes, and the money leaves if the heirs have left," he said. "It's essential that we work to raise awareness and educate people about the importance of legacy giving as a way to strengthen our rural economies now and in the future."

Gray likened the story to the work of North Carolinian Hugh Hammond Bennett, who pioneered the soil conservation service movement in the 1920s and 30s. Poor planting techniques were diminishing soil and endangering the future of farming across the country. "It's the perfect analogy," he said. "How can we keep the money from blowing away like the soil?"

Tolle Whiteside also noted that the report's estimates of wealth transfer by county can serve as a valuable tool for establishing realistic goals

about building endowments in the community. But she, too, cautioned about getting tied to exact numbers. "We consider the report as a way to start the conversation about the importance of planned giving," she said. "The report also helps to strengthen the concept of communities taking the responsibility for the stewardship of their own futures."

This concept is becoming only more relevant as local, state and federal government dollars continue to decrease.

Rural residents across America are known for their generosity, and North Carolinians are no exception. "Checkbook giving" and helping our neighbors in good times and bad are part of our culture. But legacy giving is not yet as high on the radar. "Our job is to connect community philanthropy to economic survival in North Carolina," said Gray. "And community foundations need to be perceived as one of the best institutions for shepherding those dollars."

Tolle Whiteside concurred. "Community foundations are one of the best resources for leaving a lasting legacy to sustain our rural economies," she said. "We have in place flexible vehicles to help our rural residents ensure that their charitable dollars stay in their local communities to serve needs now and for generations to come."

A copy of the entire report by the NC Rural Economic Development Center is available at ncruralcenter.org.

Growing your funds

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– and grow – an endowment speaks volumes about your agency’s leadership and intent to provide your programs now and in the future.

Don’t overlook planned giving

While a bequest may have established your endowment, future bequests can also help it grow. “Be sure to **talk about planned giving to your constituents**,” said Mary Morgan, NCCF’s philanthropy counsel. “The most substantial gifts to agencies and institutions of higher learning most often come from people leaving a portion of their estates to their favorite causes or organizations in their wills,” she said. “It’s substantial enough to be a concept that should continuously be in front of your constituents.” (See more information about planned gifts on our website at nccommunityfoundation.org under the “Giving” tab.)

Family fund ideas

Many of the ideas that can help an agency grow its fund can be modified or applied on a smaller scale for an endowment set up by a family or to honor an individual. Some families do their own **appeal letters to other family members**. Some request that all **gifts to mark anniversaries, birthdays, milestones or other special occasions go toward the endowment**. A number of small gifts adds up over time. “It’s all about keeping the fund alive,” said Stewart. “Families need to ask themselves, ‘Who can we get in touch with who knew the original donors?’”

Sometimes scholarship recipients can help scholarship funds grow by **providing testimonials on the value of their education**. Many of our recipients are the first in their families to attend college and tell a very compelling story about how the scholarship is changing their lives, as well as future generations of their families.

We’re here to help

So establishing the fund is step one. Please don’t make it the last. Be sure to contact the NCCF to help you develop strategies to ensure your fund continues to grow now – and in the future.

Beth Boney Jenkins, Mary Morgan and Leslie Stewart (L-R), who comprise NCCF’s development team, invite you to contact them

about establishing or growing your funds and our many planned giving options. Call Beth or Mary at 919-828-4387 or Leslie at 828-328-1237.



Carteret Community Foundation

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of the Month award, granted in partnership with a local restaurant to honor individuals and groups that provide exemplary service to local causes.

Despite its challenges, the county regularly appears on “best places to live” lists. Carteret is famous for its Crystal Coast, with some of the state’s most popular beaches, including Emerald Isle, Atlantic Beach and Pine Knoll Shores, a planned community originally developed by the Roosevelt family. Beaufort, the county seat, is one of the state’s oldest towns and boasts its own picturesque waterfront. Morehead City, the largest municipality, blends the salty flavor of a working harbor town with several world-renowned maritime research facilities.

The Carteret Community Foundation has worked to support the diverse needs of this seaside county for nearly three decades. “It’s clear that the Carteret affiliate is making a difference and is truly an effective resource in the local community,” said NCCF CEO Jennifer Tolle Whiteside. “We are honored to have served as their foundation partner for the last seven years and look forward to continued success in the future.”



Susan Sullivan

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Visit nccommunityfoundation.org and click on **Affiliates** to utilize an interactive statewide map to locate affiliate foundations in 66 counties across North Carolina.