



PHILANTHROPY FOCUS

A PUBLICATION OF
FOUNDATION FOR
THE CAROLINAS

FALL/WINTER 2017

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SAVE THE DATE

MARCH 22, 2018

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The Carolinas Annual
Meeting

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PROFESSIONAL ADVISOR SPOTLIGHT

Q&A with Andrea Chomakos

Andrea Chomakos, Partner at McGuireWoods, is a valuable FFTC partner. As a professional advisor, she encourages clients to consider innovative, efficient ways to incorporate charitable giving in their current and long-term planning.



Andrea Chomakos

Q: What is your relationship with Foundation For The Carolinas?

I've been working with Foundation For The Carolinas since I first came to Charlotte in 2001. Through the years I've had clients establish donor advised funds and endowments with FFTC. I have also served on the Cabinet of Professional Advisors. Most recently I became a member of the Robinson Center for Civic Leadership.

Q: What value does your partnership with FFTC bring to your clients?

For me it is knowing and trusting that my clients will be receiving excellent and professional service. When clients talk about their charitable intentions, we often discuss their options – private foundation, direct gift and, inevitably, donor advised funds. While other providers offer donor advised funds, I know FFTC will provide a personal relationship to address their philanthropic goals.

Q: How do you encourage clients to consider giving as part of their estate plans?

I often suggest a charitable gift as part of their estate plan. They can establish a fund that is flexible, that their family can participate in and that can perpetuate charitable giving for generations. It is a win-win when coupled with the estate tax savings.

Q: What would you share with colleagues who haven't yet partnered with FFTC?

I would encourage others to consider FFTC since they provide a broad array of services and are more flexible in accommodating donor intentions and gift planning than other "institutionalized" funds. For example, FFTC takes real estate and closely held business interests, which many other community foundations do not. FFTC funds can have customized investment strategies, which is unique. Finally, the staff at FFTC can help a family structure their charitable giving to build a legacy for the family and our communities.

MCKAY SISTERS CREATE ENDURING LEGACY WITH ENDOWMENT

Katherine and Jane McKay were born and raised on a farm in Robeson County and graduated from St. Andrews College in Laurinburg. Katherine earned two masters degrees, and both sisters became elementary school teachers. Katherine taught for 35 years, and Jane was the librarian for the Scotland County School System.



Katherine and Jane McKay

The McKay sisters led frugal lifestyles, which allowed them to accumulate a significant estate and, in turn, leave a significant planned gift. The multi-million-dollar Jane Graham McKay and Katherine Hill McKay Endowment was established at FFTC when the sisters passed away in 2016.

The endowment recently announced \$20,000 in scholarship awards to seven local students. The endowment also announced a \$25,000 grant to the Scotland County Humane Society for the purchase of a van to transport animals.

Going forward, it will support cancer research, religious organizations and other causes.

"Anyone who knew the McKays remembers them for their faith, love of education and love of cats," said Dan Woerner, their close friend and fund advisor.

The sisters lived in the same house they had built in 1950 and were known for taking their beloved cat Angel to church with them. Woerner recalled that every Sunday they would leave Angel in the car with the engine and air conditioner running.

"It's fitting that the first distributions from their endowment are going to support the causes they held dear," said Woerner.

Wherever your charitable passion lies, FFTC can help you establish an enduring legacy, honoring your commitment to the communities and causes you value most for generations to come.

Learn how to establish your unique legacy at www.ffc.org/PlannedGiving

THE SEASON OF GIVING

Foundation For The Carolinas extends our deepest appreciation to our clients, partners and friends during this season of giving. Now is an excellent time to leverage charitable tax benefits before the end of the year, while supporting the causes you value most. We hope you will consider making a gift to your fund or establishing a new charitable gift fund today.

To learn more about how we can help you achieve your charitable goals, please contact our Philanthropic Advancement team at 704.998.6412 or philanthropy@fftc.org.

Important Year-End Deadlines

Please note: In order for a cash or check gift to be credited in calendar year 2017, it must be received or postmarked by Dec. 30, 2017. Gifts of stock must be received into the Foundation's brokerage account on or before Dec. 29, 2017.

To ensure that grants from your charitable fund are mailed before the New Year, please submit your recommendations by Dec. 20, 2017 for previously approved organizations and Dec. 15, 2017 for new organizations. For assistance, please contact our Donor Relations team at 704.973.4529 or donorrelations@fftc.org.

** The material contained herein is not to be construed as tax or legal advice.*

NEW INVESTMENT CONSULTANT

Foundation For The Carolinas is pleased to announce a new partnership with Mercer as our investment consultant. Mercer will guide our Investment Committee by providing recommendations concerning capital market conditions, asset allocation and portfolio risk, as well as investment performance reports.

Mercer is a global consulting leader in health, wealth and career services. It has provided investment services to the fiduciaries of endowments, foundations, healthcare systems, corporate and institutional retirement plans and wealth management programs for 45 years. Mercer has \$190 billion of assets under management. The transition is expected to be complete by first quarter 2018.

For more information about FFTC investments, visit www.fftc.org/Investments

SEMINARS SHARE EXPERTISE WITH AREA NONPROFITS

The Center for Nonprofit Sustainability recently hosted a series of seminars for nonprofits throughout our region:

Risk Management: Insurance, Best Practices and Beyond

held at FFTC, helped nonprofits better understand how insurance policies and risk management procedures can address organizational risk. Bryan Beasley, from Marsh & McLennan Agency, LLC, led the conversation.



FFTC Vice President Deviré Robinson leads a presentation at Rowan-Cabarrus Community College.

Collaborative Leadership: Executive Director Peer Learning Session

held at Rowan-Cabarrus Community College - North Carolina Research Campus, covered topics ranging from leadership styles and staff collaboration to culture shift and board relationships.

Planned Giving: A Platform for Growth and Stability

held at University of South Carolina Lancaster, focused on how nonprofits can prepare for legacy giving and determine organizational readiness to launch a planned giving initiative.

Visit www.fftc.org/Engage_Learn_and_Connect to learn about upcoming learning and networking events

FFTC WELCOMES VICE PRESIDENT, CENTER FOR PERSONAL PHILANTHROPY

I'm Rosalind Taylor and I'm honored to join the Center for Personal Philanthropy at FFTC.

My passion for relationship management has landed me in the ideal role – managing the donor experience at FFTC for individuals and families. My mission is to provide our fundholders with the resources necessary to ensure that their philanthropic goals are met.



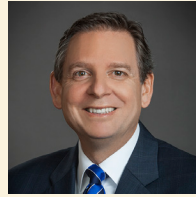
Rosalind Taylor, CFP®

Prior to joining the Foundation, Rosalind was a Private Client Manager at U.S. Trust, Private Wealth Management at Bank of America.

CIVIC LEADERSHIP 2017 YEAR IN REVIEW

Brian Collier

Executive Vice President



Brian Collier

The Robinson Center for Civic Leadership had a successful and eventful 2017. We recently held our State of the Union for members to provide updates and reflect on our programs and partnerships over the last year. These are some of the highlights:

Economic Opportunity

In March, the Charlotte-Mecklenburg Opportunity Task Force released its report, an evolving document that represents two years of studying economic mobility within the Charlotte-Mecklenburg community. The Task Force presented nearly 100 strategies and recommendations, bringing attention to issues that affect economic mobility, such as the impact of segregation and lack of social capital in low-opportunity areas.

In September, the Leading on Opportunity Council was formed to implement these recommendations. The Council is comprised of 19 members, chaired by James E. Ford and Andrea Smith, and is a representation of our diverse community, spanning across disciplines, backgrounds and ideologies.

Learn more at www.leadingonopportunity.org

Charlotte Mecklenburg Community Foundation

As a direct result of the report, CMCF revamped its funding priorities to align with the recommendations. This included the following changes to our grant cycles: 1) the expansion of Children and Youth grants to include young adults; 2) Social Capital grants' renewed focus on "Life Navigators," mentors and sponsors who can cultivate social capital and develop pathways to opportunity; and 3) the addition of a new Family Stability grant cycle that focuses on building strong, stable households.

Community Engagement

Continuing its mission as convening space for the community to learn and make connections, the Robinson Center Civic Leadership hosted a number of engagement opportunities:

Richard Reeves, *Dream Hoarders*

In September, Richard Reeves, a contributor to the Opportunity Task Force, led a public discussion on his latest book, *Dream Hoarders*. In his book, he asserts that the most important gap in America is between the top 20 percent – not just the 1 percent – and everyone else.

Matthew Desmond, *Evicted*

Also in September, FFTC joined several other groups to host Pulitzer Prize-winning author Matthew Desmond, who discussed his bestselling book, *Evicted: Poverty and Profit in the American City*, which tells the true stories of families struggling to break the cycle of poverty.

On The Table CLT: One Day. Many Voices. One Community

In October, On The Table CLT (funded by Knight Foundation and FFTC) hosted a countywide discussion on how we can make our community more connected, dynamic and opportunity rich. The goal was to have more than 5,000 people gather in small groups for dialogue. As a Super Host, FFTC welcomed nearly 100 participants to discuss social capital.



FFTC staff members Whitney Feld and Will Jones coordinated the Foundation's participation in On The Table CLT.

For more information, visit www.civic-leadership.org

GET ENGAGED THROUGH CIVIC LEADERSHIP

The Robinson Center for Civic Leadership is FFTC's flagship program, addressing the most critical needs and opportunities affecting our region. Initiatives and learning events are supported by our generous RCCL members.

Benefits of membership include invitations to experiential events, educational programming and engaging in dialogue about major community issues.

Learn more about our initiatives and membership at www.civic-leadership.org



Pictured from left: Major Mike Campagna, Nish Jamgotch Jr., Toussaint Romain and FFTC Executive Vice President Brian Collier.

CAMPAGNA, ROMAIN AWARDED NISH JAMGOTCH JR. HUMANITARIAN AWARD

The 2017 Nish Jamgotch Jr. Humanitarian Award was recently awarded to Charlotte-Mecklenburg Police Department Major Mike Campagna and Mecklenburg County public defender Toussaint Romain for their work during the 2016 Keith Lamont Scott protests.

The Nish Jamgotch Jr. Humanitarian Award is presented annually to an individual or group that demonstrates exceptional service to the community. Named for the retired UNC Charlotte professor who established the program, the award is facilitated by FFTC.

Campagna was in charge of the Central Division, which encompasses Uptown Charlotte, in September 2016. Referred to as “Captain Mike” during the protests, he is credited with using dialogue to help maintain peace. Romain received national recognition as the “man in the white shirt” after images of him standing between demonstrators and police were broadcast on CNN. He remained a constant figure throughout the protests, helping to maintain peace and promote dialogue.

A WAY HOME ENDOWMENT NEARS \$20 MILLION GOAL

In 2013, Foundation For The Carolinas and the City of Charlotte partnered to create the \$20 million A Way Home Endowment. The effort addresses the gap in our community’s support for families experiencing or at-risk for homelessness.

The City of Charlotte committed \$10 million for the endowment, and FFTC has raised nearly \$9.6 million in pledges/commitments to date from the philanthropic community. The goal is to raise the remaining \$444,000 by end of 2017. Once fully funded, the endowment will provide rental subsidies for 110-130 homeless families annually, matched with support services funded by Mecklenburg County. It will also provide funding for targeted prevention support to hundreds of families at risk of becoming homeless each year.

In the meantime, FFTC, various houses of faith and others have funded a pilot phase to begin serving families and test approaches before scaling the program. As of this July, nearly \$1.1 million has been granted to Charlotte Family Housing, Salvation Army and Renaissance West Community Initiative to provide housing subsidies and case management for 114 homeless families. Additionally, nearly \$90,000 has been granted to Crisis Assistance Ministry to provide targeted prevention services for 247 families at risk of becoming homeless. So far, more than 1,100 parents and children have been helped by A Way Home.

This pilot phase has proved invaluable in preparing for the full launch of A Way Home in 2019.

RESTORATION OF CAROLINA THEATRE BEGINS

Recent visitors have no doubt noticed the large fences circling what once was the Carolina Theatre Park, signifying the start of restoration on the 36,000-square-foot historic movie palace.

Behind the fence, crews have been busy readying the 90-year-old Carolina Theatre for construction. The historic façade that formerly framed the entrance of the theatre – and that had been dismantled and safely stored under the theatre’s stage for decades – was removed to a secure location. Deep foundation work in the theatre’s basement will begin in late November.

For more information visit: www.ffc.org/carolina_theatre



LOCAL TECH FIRM PLEDGES 1% EQUITY TO FFTC

MapAnything has long been a supporter of Pledge 1%, a global movement that encourages companies to pledge 1 percent of staff time, equity, product or profit for their communities.

The company provides location services for Salesforce data, and it was Salesforce, a founding partner of Pledge 1%, that inspired the local tech company to subscribe to the 1-1-1 philosophy. MapAnything, having already contributed 1 percent of its technology and 1 percent of its people (through volunteering with dozens of community nonprofits), recently announced its intention to pledge 1 percent of equity in its company to Foundation For The Carolinas.

The gift allows MapAnything to be charitable now and in the future, when the shares are liquidated. The resulting funds will be used to create an FFTC Corporate Donor Advised Fund, through which MapAnything can make grants to nonprofits.

“We are hopeful that MapAnything’s gift will inspire other companies and business owners to review their charitable goals and consider whether a similar gift will help achieve those goals,” said Doug Benson, FFTC Deputy Counsel and Vice President, who helped structure the transaction.

MapAnything CEO John Stewart said, as the company has grown since its founding in 2009, it consistently prioritized its philanthropic endeavors. Its charitable footprint has grown with the company – earlier this year, MapAnything announced a funding round of \$33.1 million, and it has more than 1,400 clients and 150 employees.

The 1 percent equity gift was made through FFTC’s subsidiary, Community Investments Foundation, which allows the Foundation to accept gifts of ownership interests in privately held companies for charitable purposes.

“The FFTC team was knowledgeable and made it clear that we were partners working together to achieve a common goal,” Stewart said. “After working closely with the Foundation the past several months, it is clear why they have achieved the record of success in the Charlotte region and have made a lasting impact on individuals and organizations through the grant programs and support they provide.”

Visit www.GiveBusinessInterests.org for more information

GIVE, GRANT, GROW INITIATIVE INCREASES SUPPORT IN REGION

Foundation For The Carolinas piloted a new partnership this year with its regional affiliate boards – Give, Grant, Grow.

The program’s goal is to increase grants to local nonprofits. FFTC has matched contributions from regional affiliate board members dollar-for-dollar. The program also aims to grow the endowed funds for regional affiliates, ensuring future support for these communities. The first year of Give, Grant, Grow partnership has reaped positive results, including:

- ▶ Lancaster County Community Foundation increased its annual grantmaking by 113%
- ▶ For the time first in its history, the Stanly County Community Foundation awarded more than \$50,000 to local nonprofits
- ▶ York County Community Foundation far exceeded its annual match goal of \$10,000, raising more than \$22,000

FFTC manages 13 regional affiliates in N.C. and S.C., which are led by boards of local leaders. These affiliates encourage philanthropy in their counties and make grants to nonprofits addressing their communities’ unique needs.

Read more at www.ffmpeg.org/regional_affiliates



Big Brothers Big Sisters of Central Carolinas received a \$5,000 grant to expand its one-on-one mentoring program between York County students and corporate leaders.



GHA Autism Supports was one of the beneficiaries of Stanly County’s increased grant funding this year. The nonprofit used the funds to support Camp Puzzle Piece, an outdoor summer day program for children with autism.

COUPLE USES DONOR ADVISED FUND TO ESTABLISH SPAY NEUTER CENTER

Before giving to the Animal League of Gaston County, Michael and Lenora Borchardt did their “research” on the organization ... by adopting four dogs from the animal care group. Their familiarity with the Animal League made it an easy decision to donate toward the expansion and relocation of an existing spay neuter clinic to downtown Gastonia.



Using funds from the Michael and Lenora Borchardt Family Foundation – a donor advised fund with FFTC’s subsidiary, the Foundation for the Charlotte Jewish Community – the couple made possible the Lenora Borchardt Spay Neuter Center. The new facility opened in June and replaces the small but popular Gaston Low-Cost Spay/Neuter Clinic, which recently celebrated its 30,000th surgery.

“We are honored to provide the lead gift to expand and permanently locate the clinic in downtown Gastonia, our home of many years,” said Lenora, adding the clinic was originally supposed to be named after Michael, also, but he graciously withdrew his because he felt the name would be too long. FFTC helped negotiate the naming gift.

The Animal League of Gaston County works with organizations in seven counties. The clinic has also received support from the George D. Patterson Family Fund at Foundation For The Carolinas.

Read more at www.ffc.org/FCJC



FFTC recently hosted the national launch of the *Women Give 2017* report, which found that people who give to charity are happier than those who don’t – and the more they give, the happier they are.

During the event, FFTC President and CEO Michael Marsicano reflected on the report’s findings, along with a panel of local philanthropists and civic leaders.



Due to disasters such as Hurricanes Harvey, Irma, Maria and Nate, and the Santa Rosa wildfires, E4E Relief has handled more than 11,000 relief applications, and \$11.8 million in grants have been issued.

VICTIMS OF RECENT NATURAL DISASTERS RECEIVE SUPPORT

E4E Relief – a national leader of employee disaster relief programs – has had an unprecedented few months. The FFTC subsidiary is currently helping victims of natural disasters following the impacts of Hurricanes Harvey, Irma, Maria and Nate, as well as the Santa Rosa wildfires.

The numbers are staggering. To date, the team has handled more than 11,000 relief applications for those affected by these natural disasters. For comparison, E4E Relief received 6,500 applications for all of 2016, including Hurricane Matthew victims.

More than \$11.8 million – and counting – has been issued across thousands of grants that will help disaster victims rebuild their lives, offset evacuation expenses, provide basic life necessities and support for home repairs. In addition, more than \$5 million in donations have flowed into programs managed by E4E Relief.

“It’s been an extraordinary couple of months, but our team has risen to the occasion,” said Holly Welch Stubbing, a loaned executive to E4E Relief and Executive Vice President at FFTC. “The ultimate goal is to assist people who are facing adversity and to provide a readiness plan for companies who want to help their own during catastrophic disasters and hardships.”

E4E Relief began in response to 9/11 with just one client, and was spun off from FFTC as a wholly owned subsidiary in 2014. The organization currently serves more than 1 million employees nationwide at companies as diverse as mid-size businesses and Fortune 500 organizations. Its extensive client roster includes Wells Fargo, Salesforce, Family Dollar and McKesson.

Learn more at www.e4erelief.org

Our newsletter, *Philanthropy Focus*, is designed to inform and interest donors, clients and friends of the Foundation. We welcome your suggestions at focus@fftc.org.

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Foundation For The Carolinas cares about the environment. This newsletter is printed with vegetable-based ink on paper manufactured from 10% post-consumer, recovered and mixed fiber from 100% certified sources.

FFTC TO HOST HOLIDAY POP-UP SHOP

Poptopia Holidays: 220 North Tryon pop up shop will return to the Sonia and Isaac Luski Gallery at Foundation For The Carolinas from Nov. 28 through Dec. 2.

The third annual event presented by Charlotte Center City Partners will feature 20 local and national vendors selling a variety of goods, from crafts and jewelry to clothing and books. Complimentary coffee, cider and hot chocolate will be served daily, and there will be sponsored events each evening.

"The purpose of Poptopia Holidays is to create an exciting shopping experience in Uptown," CCCP Director of Retail Chris Hemans said. "This effort will present a great opportunity to prove that workers, residents and visitors are hungry for uptown shopping."

Store Hours

Nov. 28
5 p.m. - 8 p.m.
(VIP event)

Nov. 29
11 a.m. - 8 p.m.

Nov. 30:
11 a.m. - 9 p.m.

Dec. 1
11 a.m. - 8 p.m.

Dec. 2
9 a.m. - 8 p.m.



SAVE THE DATE: 2018 ANNUAL MEETING

Save the date for the 2018 Foundation For The Carolinas Annual Meeting luncheon, set for **Thursday, March 22**, from noon to 1:30 p.m. at the Charlotte Convention Center.

The Annual Meeting is one of the region's largest and most anticipated gatherings, providing an opportunity for attendees to learn about philanthropy and civic leadership, and to hear from nationally acclaimed, thought-provoking speakers. Each year, the Annual Meeting convenes more than 1,500 leaders from the civic, corporate and nonprofit sectors for a celebration of philanthropy in our region.

Seats will be available for purchase in January at www.fftc.org. For sponsorship information, contact AnnualMeeting@fftc.org or 704.973.4588.



NEW FFTC WEBSITE

Visit the new www.fftc.org to learn more about our mission and how we can help you realize your philanthropic vision.