

PHILANTHROPY FOCUS

Shaping the Future of Philanthropy

How FFTC is
adapting to meet
today's challenges
and tomorrow's
opportunities.

Learn more on page 4

CAROLINA

NONPROFIT
Business Agility Series

Reality, Resilience, Response

A collaborative initiative with: Foundation For The Carolinas, United Way of Greater Charlotte, The Lee Institute and SHARE Charlotte

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Turning Giving into Happening

Mental Health Nonprofit HopeWay Makes Hope Tangible for Families in Need

When Dr. Allyson R. Kuroski-Mazzei returned to North Carolina in 2016, she set out to fill a critical gap in care as the founding CEO and chief medical officer of HopeWay. At the time, families had no in-state residential treatment options for mental health, often facing either short hospital stays or sending loved ones far away.

Today, HopeWay has grown into a national leader in evidence-based care for psychiatric, medical and substance-use disorders. Its 20-acre Charlotte campus now serves children, adolescents and adults with specialized programs for eating disorders, veterans and first responders. In 2024, HopeWay served more than 1,000 clients, opened a new teen campus, and launched a health equity initiative in partnership with Novant Health Foundation and the Michael Jordan Foundation to expand access for families with limited resources.

HopeWay's model emphasizes whole-person wellness, integrating therapy, medical care, nutrition education, art and music therapy and family support. Its partnership with Chef Sam Diminich and Your Farms Your Table provides more than 100 chef-prepared, locally sourced meals each day — nourishing both body and mind.

For many, HopeWay is more than treatment — it is a lifeline. One parent described its programs as “lifesaving for our daughter and life-changing for our family.” Beyond direct care, HopeWay reached over 2,200 people last year through education and advocacy, helping to normalize conversations around mental health.

As an FFTC nonprofit fundholder — and with the generosity of other FFTC fundholders who believe in its mission — HopeWay continues to expand its reach, offering dignity, healing and, above all, hope.

To read the full story, visit www.PhilanthropyFocus.org



HopeWay provides comprehensive mental health care and education to help individuals and families achieve long-term wellness.



Previously student dormitories, King's College buildings now provide supportive housing for men transitioning out of homelessness.

Honoring a Legacy: Crosland Foundation Advances Housing Solutions

Rooted in the vision of John Crosland Jr., the Crosland Foundation continues to advance his commitment to housing and community well-being. In partnership with Foundation For The Carolinas, the foundation ensures Crosland's philanthropic values remain central to its grantmaking.

Recently, that partnership supported a major investment in Charlotte's housing landscape. The Crosland Foundation Board awarded a \$250,000 grant to Roof Above to help launch its campaign to purchase and renovate the former King's College dormitories. The project creates transitional housing for men experiencing homelessness — a reflection of Crosland's belief that safe, stable housing is essential.

The Crosland Foundation awarded \$1 million in grants this year, continuing its tradition of giving that typically represents 5% to 6% of its spendable resources. While annual awards vary, the focus remains constant: supporting work aligned with Crosland's legacy of strengthening communities through housing, education and compassion.

A visionary developer, civic leader and philanthropist, Crosland founded Charlotte's Habitat for Humanity chapter. Today, through its partnership with FFTC, the Crosland Foundation continues investing in solutions that create stability, dignity and opportunity across the region.

To learn more about creating your own philanthropic legacy, contact philanthropy@fftc.org

Custom Giving in Action: The Crosland Foundation

The Crosland Foundation, a supporting organization of FFTC, showcases how custom philanthropy services can sustain a donor's vision. In partnership with FFTC, the foundation continues John Crosland Jr.'s legacy and is an enduring example of personalized philanthropy in action.

Advisor Spotlight: Sara Page Waugh on Guiding Meaningful Giving

For attorney Sara Page Waugh of Moore & Van Allen, partnering with Foundation For The Carolinas is essential to helping clients turn their charitable intentions into meaningful impact.



Sara Page Waugh

Describe your relationship with Foundation For The Carolinas.

Foundation For The Carolinas has been an integral part of my legal practice since I started at Moore & Van Allen. FFTC's educational events and materials were a significant resource as I learned about various charitable structures and planning techniques. As I began advising clients directly, FFTC provided me with the tools not only to discuss the tax planning elements of charitable planning with clients but also to help clients evaluate their charitable goals, their approach to instilling their values in later generations, and their overall philanthropic legacy.

How do you encourage clients to include charitable giving in their estate plans?

The conversation usually begins with a discussion of the estate tax implications of a plan without a charitable component. In fleshing out what the charitable piece of their estate plan looks like, we end up discussing many of the values that they wish to instill in their heirs and what their legacy should be after death.

From there, we review different charitable options. Many clients choose to establish a donor advised fund with FFTC. It allows them to involve their children in giving during their lifetime and, later, provides their heirs with a "charitable pocketbook" to continue their philanthropic interests without needing to use personal assets.

A properly structured charitable plan allows the approximately 40% of their assets that would have gone to the IRS in the form of estate tax to instead be available for the next generation to continue both the client's financial and philanthropic legacy.

What would you share with professional advisors who haven't yet partnered with FFTC?

FFTC's staff are some of the most knowledgeable people in the charitable space that I have ever met, let alone worked with. Their awareness not only of the seemingly ever-changing legal aspects of charitable giving but also the long-term and immediate needs of the community give me confidence that any plan (lifetime or testamentary) involving FFTC will be administered correctly, will adhere to my client's wishes and will significantly impact the community.

The Season of Giving: Tips for Year-End Philanthropy

The season of giving is here — and with it comes an opportunity to make a lasting impact. Give with purpose this season and make the most of 2025's charitable tax opportunities under the One Big Beautiful Bill Act. With ongoing needs across our community, your generosity matters now more than ever. Whether you're planning a year-end contribution or mapping out next year's charitable strategy, a few simple steps can help you give wisely and effectively.

Plan Ahead and Give Early

Nonprofits rely on year-end support to sustain their missions. If you have an FFTC Donor Advised Fund, consider contributing now so you're ready to respond to holiday appeals. Electronic transfers and gifts of appreciated stock are fast, efficient ways to add to your fund before Dec. 31.

Consider Different Ways to Give

You can make a charitable impact beyond cash. Gifts of stock, mutual funds, or other non-cash assets may offer additional tax advantages. Those age 70½ or older can also make a Qualified Charitable Distribution directly from an IRA to eligible charities — satisfying Required Minimum Distribution rules while reducing taxable income.

Think About a Donor Advised Fund as a Gift Option

A Donor Advised Fund can be a meaningful gift for a child, family member or business partner — teaching generosity while creating a tradition of generosity. Funds can often be opened the same day with a tax-deductible contribution.

Do Your Research

Not sure where to give? FFTC's giving experts can help you identify and evaluate trusted nonprofits that align with your interests and values, ensuring your gifts make the greatest impact.

Keep Year-End Deadlines in Mind

For more information and end-of-year giving deadlines, visit www.fftc.org/giving.

We are here to help! Contact Donor Operations at 704.973.4529 or support@fftc.org.

The material contained herein should not be construed as tax or legal advice. Donors should consult with their tax advisors.

Robinson Center for Civic Leadership

Civic Leadership in Action: Building Agility, Together

by Tracy Russ, Senior Vice President, Strategy & Impact, Robinson Center for Civic Leadership



Tracy Russ

The Robinson Center for Civic Leadership grounds FFTC's mission by transforming philanthropic assets into impactful civic action through the power of collaboration. We believe the foundation fulfills its greatest potential when our work reflects who we are: a community built on the aspirations of generous donors, engaged citizens and committed partners.

In 2025, our work has been more important than ever as nonprofits face economic pressures, rising demand for services and a need for resilience and innovation. That's why we launched the **Agility Together Initiative** — a multi-faceted effort equipping nonprofit leaders with tools and resources to thrive in uncertain times.

Agility Workshops

In partnership with United Way, Share Charlotte and The Lee Institute, FFTC has hosted monthly workshops throughout 2025, both in-person and virtually. Designed with nonprofit input, sessions focus on scenario planning, board engagement, communications, revenue diversification and collaboration.

More than 650 leaders have participated to date, including recent sessions on *Building Effective Narratives* and *Fiscal Leadership Resources*.

Agility Corps

In partnership with the Charlotte Executive Leadership Council, we are mobilizing business professionals to volunteer expertise in finance, strategy and organizational development. Dozens of volunteers are already preparing to provide one-on-one coaching to nonprofits beginning in late 2025.

Agility Hub & Playbook

To broaden access, we are creating an online hub on FFTC's website with recordings of workshops, a living playbook of tools and templates and links to local and national resources. The hub will be regularly refreshed to provide nonprofit leaders with actionable, up-to-date strategies.

Listening and Learning

The Robinson Center for Civic Leadership partnered with UNC Charlotte and United Way to survey nonprofit leaders in 2025, gathering critical insight into how funding reductions, rising demand and shifting needs are affecting the people nonprofits serve. Findings will be shared broadly in late 2025 and early 2026 to help guide coordinated action across sectors.



Anne Marie Forbes, board development specialist for Savvy Strategies Consulting, shares tips on keeping nonprofit board members engaged.



FFTC President Laura Yates Clark addresses nonprofit leaders during an Agility Series session focused on collaboration and community impact.



Tracy Russ, SVP, Strategy & Impact, Robinson Center for Civic Leadership, facilitates an Agility Series session, helping nonprofit leaders strengthen their capacity to adapt and thrive in a changing community landscape. To view video recordings of the workshops, visit www.ffc.org/NPOsupport.

Looking ahead, we will continue strengthening our community by sharing knowledge, expanding opportunities for participation and serving as a trusted collaborator in advancing our region's aspirations.

For more information: www.ffc.org/Our_Initiatives

Investing in Community Needs

Regional News: Building Partnerships & Aligning Missions in Iredell County

In Iredell County, funders and nonprofits are joining forces to tackle deep-rooted challenges faced by vulnerable children and families.

The Iredell County Community Foundation (one of 13 regional affiliates of FFTC), the United Way of Iredell County and the Iredell Health Foundation recently launched the Whole Child, Whole Family, Whole Community Collaborative with a joint investment of \$100,000.

“When we align our missions, our resources and our vision, we can create real, lasting impact,” said Brett Eckerman, executive director of United Way of Iredell County.

This first-ever collaborative grant cycle marks a milestone. Together, partners are creating a Family Navigator Program at the Boys & Girls Club of the Piedmont and building a long-term, evidence-based plan to address educational, economic and health disparities — particularly in Title I schools, where 92% of students live below the USDA poverty level.

With committed partners such as Mitchell Community College, Iredell-Statesville Schools, Pharos Parenting and the Iredell County Partnership for Young Children, the collaborative is demonstrating the power of unity to strengthen outcomes for families and communities.

For more information: www.IredellHealthFoundation.org.



Nation Ford Land Trust in York County, S.C., was awarded \$20,000 to repair damage to trails, habitats and waterways damaged by Hurricane Helene.

FFTC awards more than \$100K in regional Community Impact Fund grants

This year, FFTC awarded \$110,000 in Community Impact Fund grants to eight nonprofits across our 13-county footprint. These grants — made possible by donors who contribute to FFTC’s discretionary funds (funds that can be used to address broad areas of community need) — support areas from education to animal welfare to the arts.

Health and Human Services

- ▶ \$10,000 to Opportunity House: meeting survival needs of those experiencing homelessness.
- ▶ \$20,000 to The S.T.U.D.I.O.: providing emergency housing for students and families in crisis.

Education and Youth Development

- ▶ \$5,000 to Aspire Youth and Family: offering at-risk youth hands-on culinary training in Stanly County.
- ▶ \$15,000 to Stanly County Partnership for Children: conducting a community needs assessment to shape future programs and services.

Arts and Culture

- ▶ \$10,000 to Union County Playmakers: staging *A Charlie Brown Christmas* with a bilingual cast, ensuring inclusive access to the arts.
- ▶ \$10,000 to Lanti Foundation: supporting *Curtains Up, Community In*, an outreach program that brings live theater and music to more young people across Union County.

Environmental Sustainability

- ▶ \$20,000 to Nation Ford Land Trust: repairing hurricane Helene damage to trails, habitats and waterways in York County, protecting the region’s natural resources.

Animal Welfare

- ▶ \$20,000 – Lake Norman Humane: building a low-cost spay and neuter clinic to reduce euthanasia of adoptable animals in Iredell County.

Learn more at www.ffc.org/CommunityImpactFunds

CMCF Awards Nearly \$700K to Local Nonprofits Supporting Youth & Families

FFTC’s Charlotte Mecklenburg Community Foundation recently awarded \$672,530 to 37 local nonprofits that support youth and family. This year, grants distributed went to general operating support for the 37 nonprofits, not to specific programs, meaning nonprofits can use the funds however they’d like — salaries, administrative expenses, rent, etc. CMCF board members made the change to better support nonprofits in overcoming current fundraising challenges.



Care Ring was awarded \$25,000 to provide health services for those lacking access to affordable, high-quality preventive health care.

For a complete list of grants: www.CharMeck-cf.org

Under Our Umbrella



Read Charlotte aims to help every child become a strong reader — because reading together today builds opportunities for tomorrow. Find out more at [ReadCharlotte.org](https://www.ReadCharlotte.org).



2025 Emerging Creator and Creative Renewal fellows (from left): Raymond Grubb, Alejandro Ziegler, Carolina Ocampo Quintana, J Stacy Utley, Junior Gomez, Dee Blackburn, Osiris Rain, Umayal Annamalai. Not pictured: Tamara Williams, Emily Avery Sage.



Generations of Growth, by Charlotte-based artist Bree Stallings, welcomes the community at the Naomi Drennan Recreation Center.

Spotlighting Collaborative Initiatives Powered by FFTC

From early literacy to arts and cultural programming, Foundation For The Carolinas is proud to convene partners and power initiatives that create lasting impact across our region. Here's a look at highlights so far this year:

Arts & Science Council: Celebrating Creativity in Our Community

This year, the Arts & Science Council continued advancing its mission of making arts and culture accessible by fostering creativity in neighborhoods, investing in local artists and growing our community's public art collection.

10 Years of Culture Blocks

ASC's Culture Blocks program has brought free arts, science and history experiences directly into Mecklenburg County neighborhoods for a decade. A summer celebration at the Carolina Theatre highlighted how neighborhood-based programming connects residents with local artists and cultural organizations.

Expanding Public Art

These new public-art projects stewarded by ASC have been accepted into the official collections of the City of Charlotte and Mecklenburg County:

- *Responder* (Blessing Hancock), CFD Firehouse No. 45 in Hidden Valley — a striking steel and acrylic sculpture honoring the service and courage of Charlotte firefighters.
- *Generations of Growth* (Bree Stallings), Naomi Drennan Recreation Center — a vibrant mural that celebrates community, resilience and intergenerational connection.

Investing in Artists

This year's Emerging Creators and Creative Renewal Fellows began their artistic pursuits, supported by ASC's grantmaking — from a nine-day collage intensive in Oaxaca, Mexico, to studying immersive sound installations in Croatia and Denmark. These experiences help local artists strengthen their practices and share new cultural perspectives with our region.

To learn more, visit www.ArtsAndScience.org

Read Charlotte: Advancing Key Initiatives to Improve Early Literacy

Through partnerships with a wide range of community organizations, Read Charlotte continues to lead innovative efforts to improve literacy across Mecklenburg County.

Literacy Listens Podcast

Read Charlotte recently launched Literacy Listens, a professional learning podcast designed to help educators strengthen students' reading comprehension by focusing on listening skills. The series translates research into practical classroom application and is available on Spotify, Apple and YouTube.

Amira Digital Reading Tutor

Now in its second year, the pilot of an AI-powered reading tutor has expanded to serve more than 2,600 students across local schools and community groups, providing individualized support in both English and Spanish.



A new AI-powered tutor listens as students read aloud, assessing proficiency and delivering one-on-one tutoring.

VIP Read-Aloud Model

Developed in 2024, this framework is now used by a dozen schools and groups, helping 1,000+ students strengthen vocabulary and comprehension skills.

School Connect

Piloting in eight CMS schools this year, the School Connect framework equips community members and educators to collaborate in support of school-specific needs, with the potential to scale across the district.

To learn more, visit www.ReadCharlotte.org

Carolina Theatre: Setting the Stage for Culture and Conversation

Since its March Grand Opening, the Carolina Theatre continues to thrive as a civic and cultural hub, hosting thought-provoking conversations and premieres:

- ▶ Welcomed a sold-out theatre for **An Evening with Justice Ketanji Brown Jackson**.
- ▶ Launched a film and entertainment series for **Hispanic Heritage Month** and **Charlotte Pride**.
- ▶ Hosted the **Charlotte premiere of Roofman** as the kick-off for the Charlotte Film Festival.
- ▶ This holiday season, Carolina Theatre will host its inaugural **Christmas at The Carolina**, a monthlong celebration of festivities.

To learn more and buy tickets, visit TheCarolina.com/Christmas



Top: Sold-out evening with Justice Ketanji Brown Jackson, Bottom left: Charlotte-based film premiere of *Roofman*; Bottom Right: Upcoming Christmas shows at the Carolina Theatre.



With 10 laser projectors and advanced projection mapping, the Carolina Theatre offers an immersive visual experience that brings performances and events to life.

New Insights from Leading On Opportunity's Updated Compass

In 2014, a national study by Harvard researcher Raj Chetty revealed a startling truth: Charlotte ranked last among major U.S. cities for upward economic mobility. That finding sparked a movement — and the creation of Leading On Opportunity — to better understand and address the factors that influence a child's chance of rising out of poverty.

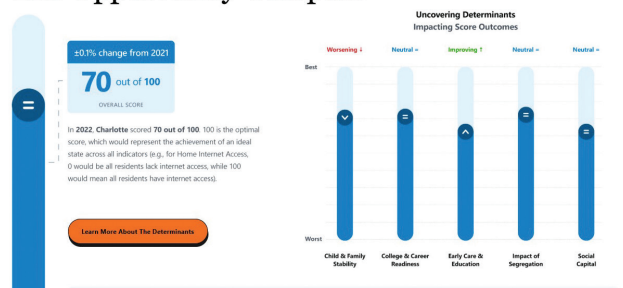
Now, Leading On Opportunity has unveiled the Opportunity Compass, a comprehensive community index measuring Charlotte-Mecklenburg's progress toward improving economic mobility. Drawing on data from 82 indicators collected between 2015 and 2022, the Compass provides a clear, data-driven picture of how families and children are faring across five key areas: early care and education, child and family stability, college and career readiness, the impact of segregation and social capital.

While the latest results show improvement in early care and education, the data also reveal a decline in child and family stability — an area that encompasses access to health care, housing, and basic needs like proximity to grocery stores. “We’re seeing outcomes declining in the areas most important to the community,” said A.J. Calhoun, director of research and impact tracking.

Leading On Opportunity's Director of Civic Engagement, Tonya Jameson, notes that community voices are helping shape the work ahead. After gathering input from more than 650 residents, the team identified growing interest in understanding and addressing mental health as part of economic mobility.

By visualizing data and creating a shared language around progress, the Opportunity Compass helps policymakers, funders and community leaders target strategies that can make the greatest impact. “This tool gives us insight into where work is needed to improve children's odds,” said Jameson. “It's a roadmap for a more equitable Charlotte-Mecklenburg.”

The Opportunity Compass



Explore the Opportunity Compass at www.LeadingOnOpportunity.org.



Gather at Belk Place

From the Carolina Theatre to 220 North Tryon, our civic campus advances FFTC's mission by bringing people together.

Belk Place offers a variety of flexible spaces – from intimate meeting rooms to grand venues – perfect for your next meeting, celebration or community event.

Reserve today and make Belk Place the setting for your next gathering.

BELK PLACE



www.220NorthTryon.org | www.TheCarolina.com

New 'Office Hours' Encourage Nonprofits to Gather, Share and Learn

This year, FFTC launched Nonprofit Office Hours as a new way to support local nonprofits. On the last Wednesday of each month, our team hosts drop-in sessions at coffee shops across the region. After a holiday break, Nonprofit Office Hours will continue in January 2026.

There's no agenda or presentation — just an open, welcoming space for nonprofit leaders to ask questions, learn more about FFTC's services and connect with our staff. By making ourselves even more accessible, we're helping organizations strengthen their work and build deeper relationships within the community.

By launching Nonprofit Office Hours, FFTC continues its role as a trusted partner to nonprofits, ensuring they have the guidance and support needed to thrive.

Visit www.ffc.org/UpcomingEvents for information on future FFTC events



Nonprofit leaders connect with FFTC staff during a recent Office Hours session — an open, welcoming space to ask questions, share ideas and strengthen community partnerships. The meetings are held on the last Wednesday of each month.

To learn more about Foundation For The Carolinas, visit www.ffc.org and www.philanthropyfocus.org.