

SUMMER 2022 | FOUNDATION FOR THE CAROLINAS

PHILANTHROPY

FOCUS



Bridging the Digital Divide

Mayor's Racial Equity Initiative seeks to address inequities in Charlotte

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FFTC Positioned for Future Success as I Approach Retirement

By Michael Marsicano

There is never a good time to end a great thing, but it's always a good time to ensure a great thing continues. That was my philosophy in announcing my retirement as president and CEO of Foundation For The Carolinas, effective January 2023.

When I step down in less than a year, it will be the conclusion of 23 years serving you as head of this venerable organization, and more than 30 years since my family and I first moved to Charlotte, where I took a position leading the Arts & Science Council. Through the years, there have been many more highs than lows, as I've watched this city, community and region achieve great things in the name of philanthropy, compassion and progress.

Many of those achievements have been thanks to our fundholders and donors, whose generosity not only supports the causes they value, but whose commitment to this community foundation has allowed FFTC to advance efforts in affordable housing, economic opportunity, racial equity, the arts, and so much more.

Your commitment continues to this day. In 2021, our fundholders contributed \$740 million to their funds, bringing the Foundation's philanthropic assets, owned and operated, to nearly \$4 billion as the new year began (compared to \$245 million in assets when I started in 1999). We are now the fifth largest community foundation out of 800 across the U.S. Also last year, we granted \$445 million to support worthy causes. In 2020 and 2021 combined—during two years of pandemic-fueled uncertainty—our fundholders granted out more than \$900 million.

I say this often when appropriately blown away: Wow.

It's no surprise, then—given our generous fundholders and the talented staff, leadership and governing board we

have in place to shepherd FFTC forward—that I approach retirement confident that FFTC's best days are ahead.

I am also facing retirement looking back, reflecting on all that we've accomplished as a community foundation in the last two decades.

Through our Robinson Center for Civic Leadership, we helped launch community-wide initiatives such as the Carolina Thread Trail,

Read Charlotte, Project L.I.F.T and Veteran's Bridge Home, as well as the endowment campaign that made possible the Levine Center for the Arts, among others. We also shepherded numerous fundraising campaigns: \$224 million raised (to date) for the Mayor's Racial Equity Initiative; \$53 million for affordable housing; more than \$50 million to renovate the Carolina Theatre, which will reopen in the spring of 2023; \$23.5 million for the COVID-19 Response Fund, and \$41 million for the Arts Infusion Fund campaign, just to name a few recent examples.

These achievements were made possible by many ... and should be celebrated by all. Time and time again, we have rallied as a community and as a region to think bigger, work better and achieve boldly.

I cannot wait to see what happens next. As long as you continue to support Foundation For The Carolinas, we will do great things, together.



Former Governing Board Chair Bill Grigg (left) and Michael Marsicano, circa 2000.

LEADING THE SEARCH

FFTC's Governing Board of Directors has appointed a committee to lead the national search for the next president and CEO of the Foundation and engaged Russell Reynolds Associates, a global leadership advisory firm, to partner with the committee in the execution of the search.

The search committee is chaired by FFTC Governing Board Chair Barnes Hauptfuhrer and includes past chair Jewell Hoover and board members Cathy Bessant, Jesse Cureton, Jada Grandy-Mock, Kelly Katterhagen, Susan Kluttz and Ruth G. Shaw. The future of FFTC is in the best of hands.

For more information on the President and CEO role, contact FFTCCEOSearch@RussellReynolds.com.

Friends Remember Life and Legacy of Dr. Ophelia Garmon-Brown

This is an excerpt from a feature that first appeared on our FOCUS storytelling website. Visit philanthropyfocus.org/Ophelia for the complete story.

Much has been written about Dr. Ophelia Garmon-Brown, the trailblazing family physician, hospital executive, impassioned community leader, missionary and ordained minister who died on Nov. 17, 2021, of cancer at her home in Charlotte. Prior to her death, she always seemed to be in multiple places inspiring multiple people—mentoring, preaching and teaching, often simultaneously.

But there are some things known best to those close to this celebrated woman whose spiritual presence prevailed in the hearts and minds of countless colleagues, friends and family members.

For instance, the doctor known for her easy smile and welcoming spirit was actually an introvert, according to her friend Tanya S. Blackmon, executive vice president and chief diversity, inclusion and equity officer at Novant Health. It wasn't until Garmon-Brown and other colleagues completed a personality assessment at work that Blackmon discovered otherwise.

"What happened was she gave so much of herself, because she cared so deeply and so much for people, but when she got home, she was exhausted," Blackmon said. "But no one ever saw that. They only saw the wonderful, warm, connected Ophelia that had all of this energy."

Opening Doors

Garmon-Brown, born Sept. 28, 1954, grew up poor in Detroit. But by 1980, the enterprising young woman had earned a bachelor's degree in biology from North Carolina Central University and her medical degree from the University of North Carolina at Chapel Hill.

In the mid-'90s, LaTonya Summers was a mental health counselor in the psychiatric unit at Presbyterian near uptown Charlotte where Garmon-Brown was working at the time. She recalled, fondly, that Garmon-Brown made her "feel proud to be a person of color at Presbyterian Hospital."

It didn't take long for Garmon-Brown to be promoted at Presbyterian, said Summers. Her emergence led to other Black professionals being promoted. Garmon-Brown's work was instrumental in changing the face of what leadership looked like at the hospital.

Providing Opportunity

Following the publication of a 2014 study that ranked Charlotte last in major cities providing opportunities for upward mobility among low-income people, FFTC helped mobilize the Charlotte-Mecklenburg Opportunity Task Force (now known as Leading On Opportunity).

Alongside local bank executive Dee O'Dell, Garmon-



Dr. Ophelia Garmon-Brown helped shape the Leading on Opportunity report, which provided recommendations to the community on improving upward mobility..



Close friends and colleagues Dr. Ophelia Garmon-Brown and Dee O'Dell co-chaired the Charlotte-Mecklenburg Opportunity Task Force.

Brown was asked to co-chair the task force whose job it was to study the issues and produce a report providing recommendations to the community. Garmon-Brown helped produce that report while undergoing cancer treatment—including surgeries for brain and kidney cancer.

Finding consensus in a task force made up of 20 community leaders coming from diverse backgrounds with differing perspectives was not easy. However, community leader Anna Spangler Nelson said her friend was always able to bring people together, no matter how far apart they were.

"It was wonderful how she bridged various communities, fluidly crossing lines that most others might see as borders," Nelson said.

"This was perhaps her most important contribution, among so many. Ophelia was humanity at its very best."

PhilanthropyFOCUS.org

FFTC is putting the FOCUS on philanthropy with our storytelling website, featuring profiles of local philanthropists, nonprofits and community partners, as well as giving tips on how to make a greater impact. Visit PhilanthropyFocus.org.

Robinson Center 2022: Continuing Our Work on Key Community Issues

FFTC's flagship program, the Robinson Center for Civic Leadership, convenes partners and funding to address our region's greatest needs and opportunities. We work with committed partners to make a transformative impact on our community.

Recent highlights and impact include:

COVID-19 Response Fund Report

When COVID-19 hit in March 2020, FFTC and United Way of Central Carolinas launched the COVID-19 Response Fund to help local nonprofits mitigate the impact of the pandemic. We recently released the COVID-19 Response Fund Report, a comprehensive review of this community-wide effort.



Launched with initial commitments from LendingTree, the City of Charlotte, Mecklenburg County, Truist and the Howard R. Levine Foundation—followed by a fundraising campaign with donations from individuals, companies and nonprofits—the fund raised nearly \$24 million. More than 400 grants were awarded to 237 local nonprofits focused on basic needs, health and mental health, youth initiatives, workforce development and the arts. Read the report at fftc.org/COVID19.

Addressing Ongoing Civic Needs

Other recent progress on RCCL initiatives includes:

- **Leading on Opportunity:** Continuing its commitment to college and career readiness—a key determinant of upward mobility—Leading on Opportunity recently added the presidents of Central Piedmont Community College, Davidson College, Johnson C. Smith University, Queens University of Charlotte and UNC Charlotte to its council. In addition, Leading on Opportunity is launching an economic mobility measurement tool later this year. Developed in partnership with the Charlotte Executive Leadership Council, the two organizations will establish a shared, quantitative definition of economic mobility for our community.
- **A Way Home:** The \$26 million housing endowment continues to help families experiencing homelessness through its support for partner agencies. In May, the board approved the addition of another agency to implement this work. The Relatives, a nonprofit that serves youth experiencing homelessness, will receive support from the endowment to help young parents achieve housing stability and long-term self-sufficiency.

- **Wells Fargo Small Business Grants Fund:** We are honored to lead the \$20 million Wells Fargo Open for Business grant program, which will provide grants for capital assets (such as equipment, technology and storefront improvements) to small business owners within Charlotte's six designated Corridors of Opportunity. Community outreach and engagement are underway to gather input on program strategies and to build awareness. Applications for grants will be available this fall.

As always, this work is made possible by generous donors to the Robinson Center for Civic Leadership, as well as the continued support of FFTC fundholders and partners.

For more information: fftc.org/Our_Initiatives

Tutoring Dashboard Promotes Volunteer Opportunities

An initiative of FFTC's Robinson Center for Civic Leadership, Read Charlotte is a community wide program uniting parents, educators and partners to improve children's literacy from birth through third grade. Want to get involved? Many partners—such as Black Child Development Institute, YWCA and International House—need volunteer tutors during the summer and upcoming school year.



Find opportunities near you using the Read Charlotte Tutoring Dashboard under the "Get Involved" tab: ReadCharlotte.org



Volunteers are instrumental in improving childhood literacy.



As part of the Mayor's Racial Equity Initiative, the Center for Digital Equity is looking to distribute 20,000 laptops in 2022.

Mayor's Racial Equity Initiative Closes in on Fundraising Campaign Goal

Last November on the campus of Johnson C. Smith University, FFTC joined with community leaders to launch the Mayor's Racial Equity Initiative, a \$250 million public-private campaign seeking to address inequities in Charlotte.

Recently, Barings (\$1.7 million), Coca-Cola Consolidated and Nucor Corporation (\$1 million each) joined 20 previously announced commitments from the public, private and nonprofit sectors, moving the private-sector fundraising campaign to \$141.5 million of its \$150 million goal. The overall fundraising campaign is at \$224 million of its \$250 million goal.

The commitments will fund work on the initiative's four priority focus areas: bridging the digital divide and establishing a Center for Digital Equity; investing in Charlotte's six "Corridors of Opportunity" neighborhoods; transforming JCSU into a top-tier, career-focused HBCU; and ensuring organizations commit to racial equity through advancing more Black leaders and leaders of color within their individual corporations.

The Charlotte Executive Leadership Council answered the initial call from Mayor Lyles for a corporate response following the murder of George Floyd and other events in 2020 that exposed longstanding racial inequities. Malcomb Coley (US central private leader and Charlotte managing partner of EY, who also serves as chair of the Charlotte Regional Business Alliance) along with Mike Lamach (current chair of the Charlotte Executive Leadership Council) serve as the campaign co-chairs.

FFTC is leading fundraising efforts, and the private dollars raised will be held in a fund at the Foundation, providing support to advance the work of the initiatives. Each of the four priority focus areas will have financial oversight by its own Funder Advisory Committee.

The work of the four priority focus areas has already begun. For instance, the Center for Digital Equity—looking to erase the digital divide—has set 2022 goals of distributing 20,000 laptops and supporting internet adoption for at least 10,000 households.

For more information and to see a complete list of donors:
www.EquityCLT.org

Arts Infusion Fund Grants Nearly \$9 million to Arts and Culture Community

With FFTC leading fundraising efforts, Charlotte's Arts Infusion Fund was launched in 2021 to boost the local arts and culture community as it recovers from the pandemic. Led by an 18-member Arts and Culture Advisory Board, the fund recently announced the approval of nearly \$9 million in grants to provide general operating support to arts and culture organizations serving Charlotte and Mecklenburg County.

The grants provide unrestricted operating support in fiscal year 2023. Since its launch, the fund has awarded \$21 million to 38 arts and science organizations, individual artists and emerging groups, unique cultural opportunities, and the Arts & Science Council.

"Our arts and culture institutions are key community assets that enrich lives, provide opportunities and bring visitors to the Charlotte area," said City of Charlotte Arts & Culture Officer Priya Sircar. "With this funding, we are pleased to offer reliable financial support through the 2023 fiscal year while we develop a longer-term cultural plan for the future of arts and culture in Charlotte and Mecklenburg County."

The pandemic and shutdown hurt local arts and science nonprofits, resulting in \$50 million in lost revenues. To assist, FFTC raised \$23 million from donors, with an additional \$18 million from the City of Charlotte, and will distribute \$41 million over the next three years. The fund is a partnership between the City, FFTC and generous donors.

For a full list of contributors to the fund and recent grant recipients: fttc.org/Arts



Photo Credit: Chris Edwards courtesy of McColl Center



Photo Credit: Donna Bise courtesy of Children's Theatre of Charlotte

The Infusion Fund is granting \$41 million over three years to local arts groups and artists, such as the McColl Center (top) and Children's Theatre of Charlotte.

FFBP Grants \$40,000 to Programs for Charlotte's Black Community

From building healthier neighborhoods to training mentors, Foundation For Black Philanthropy's recent grantmaking cycle supported a diverse range of programs benefitting Charlotte's Black community. An affiliate of Foundation For The Carolinas, FFBP recently distributed \$40,000 in grants to eight local nonprofit initiatives:

- ▶ ASPIRE Community Capital's Community Business Academy
- ▶ City Startup Labs' ReEntry Entrepreneurship Program
- ▶ Care Ring's Nurse-Family Partnership program
- ▶ Johnson C. Smith University's Birthing Professionals Program
- ▶ Money Magnets Club's Spring/Summer Entrepreneurship Program Series and Fall Literacy Learning Lab
- ▶ She Built This City's youth 3D printing and STEM training
- ▶ My Brother's Keeper Charlotte-Mecklenburg's mentor training program
- ▶ Rebuilding Together of Greater Charlotte's Building a Healthy Neighborhood initiative



ASPIRE's Community Business Academy trains entrepreneurs in essential business skills.

Formerly known as the African American Community Foundation, FFBP has granted nearly \$600,000 since inception.

Join the Collective Power of Black Philanthropy

Did you know you can highlight the impact of Black philanthropy with each grant you make by affiliating your new or existing FFTC charitable fund with Foundation For Black Philanthropy?

When you affiliate your charitable fund, you continue supporting the causes you care about most—whether your favorite arts groups, your place of worship or nonprofits that invest in the Black community—and grants issued to nonprofits from your fund will display the FFBP logo.

Whether you affiliate your FFTC charitable fund or give to FFBP's community grantmaking endowments, you join a network of Black philanthropists who are investing in our region. You also have access to educational events and networking opportunities with others who share a common vision for empowering Black communities.

Learn more or give: fftc.org/FFBP



She Built This City instructor leads a hands-on toolbox build with youth at the Bette Rae Thomas Recreation Center.

CMCF Awards \$550,000 for Projects Serving Children, Youth and Young Adults

Investing in children and the family members who care for them remains a top priority for the Charlotte Mecklenburg Community Foundation. That's why CMCF—a regional affiliate and grantmaking arm of FFTC—recently granted \$550,000 to 26 local nonprofits for projects that focus on children, youth and young adults that help address these needs.

The grants reflect the many ways nonprofits are expanding opportunities, building social capital and advancing equity for young people. Projects funded by CMCF range from supporting first-generation college students, to preparing youth for future employment, to providing out-of-school programs for immigrant and refugee students. A few highlights include:

- ▶ \$15,000 to CrossRoads Corporation for Affordable Housing and Community Development to provide programming that supports youth in the Grier Heights Community, including college preparation, access to mental health support and mentoring
- ▶ \$25,000 to ourBRIDGE for Kids to provide out-of-school programs for immigrant and refugee students in K-8
- ▶ \$25,000 to She Built This City to provide their tuition-free, state-certified pre-apprenticeship training targeting young women in low-income neighborhoods
- ▶ \$25,000 to Time Out Youth to provide programming that will ensure college readiness and career success for LGBTQ students in Charlotte

CMCF's grantmaking program was established following a \$35 million bequest from Lucille Puette Giles in 1995. To date, the Charlotte Mecklenburg Community Foundation has awarded more than \$55 million in grants—\$20 million beyond the original gift.

Because the fund was established as an endowment, it provides a permanent source of grantmaking—while preserving the corpus—to address community needs as they evolve over time.

For a complete list of grants: charmeck-cf.org

The Plus Collective Grants \$135,000 to LGBTQ+ Nonprofits

Kicking off Pride Month in June, The Plus Collective – a collective giving program and endowment at FFTC serving Charlotte’s LGBTQ+ community – announced \$135,000 in grants to nine local nonprofits.

Since it was founded in 1994, The Plus Collective (formerly known as the Charlotte Lesbian and Gay Fund) has distributed more than \$1.7 million to local nonprofits serving our diverse LGBTQ+ community.

“As a giving organization, The Plus Collective is proud to harness the collective power of our generous donors, turning their individual donations into impactful unrestricted operating grants that make real and lasting impact to organizations that benefit, support and empower our Charlotte LGBTQ+ community,” said Shelly Schoenfeld, chair of The Plus Collective board. “This year, like every year, the organizations we funded are integral parts of our vibrant and diverse Charlotte LGBTQ+ community.”

The most recent round of grants provided general operating support, including:

- ▶ \$12,500 to Charlotte Black Pride
- ▶ \$14,000 to Charlotte Pride Band
- ▶ \$5,500 to the Charlotte Royals Rugby Football Club
- ▶ \$12,500 to the Gay Men’s Chorus of Charlotte
- ▶ \$16,000 to One Voice Chorus
- ▶ \$25,000 to PFLAG Charlotte
- ▶ \$25,000 to Time Out Youth
- ▶ \$12,000 to Transcend Charlotte
- ▶ \$12,500 to Twirl to the World Foundation

For more information: ThePlusCollective.org



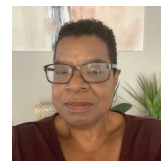
Plus Collective grantee Charlotte Pride Band provides an open environment for musicians of all ability levels while promoting the value and respect of LGBTQIA+ people in the Charlotte area through quality musical performances.



One Voice Chorus provides a welcoming place for LGBTQ+ people to express their musical artistry together.

North End Community Leader Named 2022 Jamgotch Humanitarian Winner

Despite a year of overwhelming personal loss, Melissa Gaston’s perseverance, strength and dedication to her community shone through. It’s one of many reasons the community organizer was recently named the 2022 Nish Jamgotch Jr. Humanitarian Award winner.



Melissa Gaston

The Nish Jamgotch Jr. Humanitarian Award—facilitated by FFTC, which also holds the fund that supports the award—is presented annually to an individual or group whose achievements “elevate quality of life and enhance the survival, dignity and well-being of humankind in Charlotte-Mecklenburg.”

Gaston is executive director of the North End Community Coalition, is a collaborative partnership of eight historically black neighborhoods just north of Uptown—including Druid Hills, Graham Heights, The Park at Oaklawn, Greenville and others. The group advocates for an equitable community by amplifying voices and connecting neighbors to opportunities. She co-founded the organization alongside her husband, Darryl Gaston, who passed away unexpectedly in February 2021. Despite her loss, Melissa picked up the pieces and continued her work for the community.

“Melissa has shown tremendous strength, humanity and love for those around her, even during a very difficult time,” said Brian Collier, FFTC executive vice president and a member of the award committee. “She is an example to us all of how, even in our darkest moments, we can continue to fight for what we believe in. Her fierce dedication to her neighbors in the North End ensures their voice is heard.”

In addition to her community advocacy work, Gaston is a Realtor with her own firm, Melissa Gaston Realty. She has served as secretary, vice president and president of various homeowner associations, as well as a volunteer with local nonprofits.

Named for the late UNC Charlotte professor who established the program, previous Nish Jamgotch Jr. Humanitarian winners include Adrienne Threatt, co-founder of Hope Vibes; Riley Howell and Reed Parlier, two UNC Charlotte students who died when a gunman opened fire in their classroom in 2019; and Sil Ganzó, founder and executive director of ourBRIDGE for KIDS, among others.



Nish Jamgotch Jr.

In the words of Dr. Jamgotch, “to be creative means to uncover something new; or to synthesize seemingly unrelated experiences in a fresh and inspiring way; or to provide a foundation for future intellectual and scientific breakthrough that can truly make a difference,” and it is in this spirit that awards should be made.

For more information: philanthropyfocus.org/nish-jamgotch

Foundation Team News

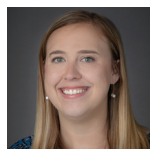
Welcome New FFTC Employees

Robin Barefoot joined FFTC as Associate General Counsel & Vice President, bringing a wealth of knowledge related to community foundations, planned giving, and other charitable and nonprofit issues.



Robin Barefoot

Caitlin James joined FFTC as Vice President, Donor Relations, where she manages the Donor Relations team and focuses on optimizing customer experience.



Caitlin James

Elizabeth Kiser joined FFTC as Senior Vice President, Philanthropic Advancement, overseeing the Philanthropic Advancement team with a focus on fundholder stewardship and business development.



Elizabeth Kiser

Sara Piner has returned to FFTC as Vice President, Planned Giving. She will steward existing clients, cultivate new planned gifts and promote FFTC Community Impact Funds.



Sara Piner

Diversity, Equity and Inclusion Update

Eddie Taylor has joined FFTC as our first DEI Manager and will support our organizational goal of “leading with equity.”



Eddie Taylor

Promotions

Rebekah Allison: Vice President, Center for Personal Philanthropy

Doug Benson: General Counsel & Senior Vice President

Whitney Feld: Vice President, Philanthropic Advancement

Deviré Robinson: Vice President, Philanthropic Advancement

Madeliene Tweito: Vice President, Human Resources

Evan Wolkofsky: Deputy General Counsel & Vice President

Awards

Deviré Robinson: Charlotte Business Journal's 40 Under 40

Tara Keener: Charlotte Ledger's 40 Over 40



Photo Credit: Grant Baldwin Photography

Deviré Robinson, Vice President, Philanthropic Advancement receives an award for Charlotte Business Journal's 40 Under 40 list.



A \$3,000 grant was awarded to Foothills Farmers Market for a SNAP incentive program to encourage low-income shoppers to eat local, healthy foods.

Around Our Region

Foundation For The Carolinas has 13 regional affiliates across the Carolinas, whose advisory boards thoughtfully award grants to local nonprofits. A number of county affiliates recently announced grants that will address local needs.

Cleveland Supports Foothills Farmers' Market

The Cleveland County Community Foundation recently awarded 11 grants totaling more than \$27,000, including a grant to the Foothills Farmers' Market, which provides equitable community access to fresh local foods. The grant will increase the buying power of low-income farmers' market shoppers and make local, healthy foods more affordable.

Cabarrus Awards Grant to Address Homelessness

Thanks to a recent grant from the Cabarrus County Community Foundation, the Cabarrus Cooperative Christian Ministry will expand education programs and support services for families experiencing homelessness.

The \$10,000 grant was one of 19 recently awarded to local nonprofits, with \$71,200 granted in total. Grants will support programs that mentor at-risk youth, fight food insecurity and support workforce development, among others.

York Funds Health Care and Food Programs

The York County Community Foundation recently announced results of its latest grant cycle, with support going to nonprofits that address arts and culture, education, environment, health and human services.

The \$28,700 awarded to 13 local nonprofits included, among others, \$4,200 to York County Free Clinic to provide health services to uninsured residents and \$2,000 to the Community Café Food Truck to serve free meals to those in need.



A \$2,000 grant was awarded to Community Café, a food truck that provides healthy meals at no cost throughout York County.

For more information: fftc.org/RegionalAffiliates



Brave of Heart Fund leaders and team members accept the Halo Award presented at Engage for Good's 2022 conference and awards ceremony.

E4E Relief Celebrates 20 Years

Twenty years ago, FFTC launched its first employee relief fund for a company that wanted to support its employees following the tragic events of 9/11. From that initial fund grew E4E Relief, now a subsidiary of the Foundation and a leader of employee relief programs, with clients around the world.

In recognition of its work, E4E Relief recently received the 2022 Excellence in International Philanthropy Award, presented by global grantmaking leader CAF America.

The award—and E4E Relief's 20th anniversary—come on the heels of a remarkable year of impact. In 2021, E4E Relief managed more than 100,000 grant applications from 90 countries and awarded \$63 million to employees and their families dealing with COVID-19, climate-related disasters, personal disasters and financial hardships.

War in Ukraine

With the escalating conflict and threat of a Russian invasion of Ukraine, E4E Relief began developing a plan to help companies whose employees would be impacted.

Following the invasion on Feb. 24, E4E Relief launched the first Ukrainian aid program. On March 5—10 days after the initial airstrikes—the first funds were distributed. As of June 1, 18 companies are participating and \$1.2 million has been awarded to employees and their families, all of whom were among the millions affected by the war.

Brave of Heart

In 2020, E4E Relief partnered with New York Life Foundation and the Cigna Foundation to establish the Brave of Heart Fund to support family members of healthcare workers and volunteers who lost their lives to COVID-19.

Since then, the fund has awarded more than \$31 million to 909 families in 44 states. Brave of Heart was recently recognized by Engage for Good with a Halo Award for the "Best COVID-19 initiative".

Today, the fund continues to make an impact in areas that include the Brave of Heart Scholarship, family grief and bereavement support, healthcare worker emotional well-being, and diversification of the healthcare workforce.

Learn more at E4ERelief.org and view the Brave of Heart Impact Report: employee relief fund.org/brave-of-heart-fund



FFTC Welcomes Seven New Governing Board Members

The work of Foundation For The Carolinas is guided by a Governing Board of Directors, led by Board Chair Barnes Hauptfuhrer and made up of local leaders from our 13-county region who provide stewardship, oversight and vision. The board recently welcomed seven new and returning members, including:

- ▶ **Kieth Cockrell**, president, Bank of America Charlotte
- ▶ **Malcomb Coley**, Charlotte managing partner, EY
- ▶ **Dr. Betsy Fleming**, founder and leadership coach, Cressence LLC
- ▶ **Lynn Good**, chair, president and CEO, Duke Energy
- ▶ **Ralph Lopez**, vice president of hub operations, CLT Airport
- ▶ **Gene McLaurin**, president, Quality Oil Company
- ▶ **Tom Nelson**, chairman, president and CEO, National Gypsum



Kieth Cockrell



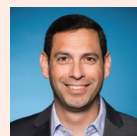
Malcomb Coley



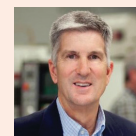
Betsy Fleming



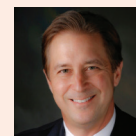
Lynn Good



Ralph Lopez



Gene McLaurin



Tom Nelson

For a complete list of our 2022 Governing Board of Directors: fftc.org/GoverningBoard

Professional Advisor Spotlight

Q&A with Holly Norvell

Holly Norvell, Partner, Trusts & Estates and Charitable Planning & Exempt Organizations at Johnston Allison Hord, is a valuable FFTC partner.



Holly B. Norvell

Q: Describe your relationship with Foundation For The Carolinas.

I have had the privilege over nearly two decades of law practice of working with generous individuals and families to facilitate transformational gifts with both the Foundation For The Carolinas and Foundation for the Charlotte Jewish Community. I also served on the FFTC's Cabinet of Professional Advisors from 2017 to 2019.

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

Partnering with FFTC has brought a very high level of client service to the families and foundations with whom we work. FFTC has been extremely helpful in facilitating gifts of real estate, closely held business interests and other assets that require special tax planning or regulatory considerations. I also work with FFTC on behalf of community partners to structure and implement gifts from major donors. These gifts would not have been possible without a close working relationship with the sophisticated legal and development team at FFTC.

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

I ask my clients to consider the impact of legacy for their family and the impact of philanthropy for their community. My most exciting engagements are when a client decides to accelerate charitable gift planning at death into gifts made during lifetime. I absolutely love helping my clients leverage the impact of their wealth and seeing them enjoy the impact of their generosity during their lifetime.

Q: How do you help your clients engage the next generation?

The families I serve include wealthy parents and grandparents who see both great opportunity and potential concern for the impact of their wealth on their children, grandchildren and later generations. Philanthropy through appropriate family-advised, family-influenced or family-controlled giving vehicles is one of the best ways to teach the next generation about stewardship, compassion and the joy of generosity.

Learn more about how FFTC partners with local advisors: fftc.org/Advisor_Resources



A Survivor's Legacy

This is an excerpt from a feature that first appeared on our FOCUS storytelling website. Visit PhilanthropyFocus.org/Bienstock for the complete story.

After surviving the Holocaust, Irving Bienstock made his way to New York, met the love of his life, Lillian, and eventually moved to Charlotte, where the couple found a home, a synagogue and a community that has honored his journey.

With Irving Bienstock recently turning 96, he wants to tell his story, challenge hatred and ensure continued support for the causes that keep Judaism and love alive, long after he has passed.

"I'm a very lucky human being," he said. "I'm very fortunate that I survived the Holocaust. Once I die, no one will ever know what the Nazis did to us, what they did to me. You must speak up if you are subject to any kind of discrimination."

To ensure his continued impact, Bienstock is leaving a legacy gift to Foundation for the Charlotte Jewish Community, in Lillian and his name, designating 16 organizations to benefit from his generosity upon passing. Established in 1997, FCJC (a supporting organization of FFTC) manages the endowments of Jewish and secular nonprofits in Charlotte and beyond. FCJC also actively helps members of the Jewish community, like Bienstock, create meaningful philanthropic plans that achieve their charitable goals.

"I am very appreciative of the time and expertise provided by FCJC with the development of my legacy plan," said Bienstock. "They simplified the process and assisted me in focusing on those charities and causes that had the greatest impacts on our lives."

Learn more about FCJC: fftc.org/FCJC

Find out how you can leave a legacy: fftc.org/PlannedGiving



The Bienstocks (top and above) were married 69 years when Lillian passed away in 2019 at age 90.

PhilanthropyFOCUS.org

FFTC is putting the FOCUS on philanthropy with our storytelling website, featuring profiles of local philanthropists, nonprofits and community partners, as well as giving tips on how to make a greater impact. Visit PhilanthropyFocus.org.

Making a Charitable Impact With Retirement Assets

Did you know you can make a charitable gift using your IRA's Required Minimum Distribution? For the past two years, FFTC fundholders Gary and Karen Pensgen have generously donated their RMD directly to FFTC's regional affiliate, the Cabarrus County Community Foundation. In 2021, their gift resulted in a nearly 90 percent increase in grants to local nonprofits while creating significant tax savings for the Pensgen family.

Through Qualified Charitable Distributions, individuals age 70 ½+ can make tax-free transfers of up to \$100,000 each year from their IRA to eligible nonprofits, thereby satisfying their annual Required Minimum Distribution, removing distributions from their taxable income, and supporting the charities of their choice.

Many of FFTC's philanthropic vehicles and giving programs are eligible to receive qualified charitable distributions from IRAs, including FFTC Community Impact Funds, Field of Interest Funds, Designated Funds, Agency Funds and Scholarship Funds. *(Please note that donor advised funds, private foundations and supporting organizations are not eligible.)*

And like Gary and Karen, donors can make distributions to support grantmaking for any of our 13 county affiliates, Foundation For Black Philanthropy or The Plus Collective.

Contact Whitney Feld, Vice President, Philanthropic Advancement at wfeld@fftc.org to learn more



Gary and Karen Pensgen

In Their Own Words

"We moved to Concord 30 years ago. We have lived, worked and shopped in Cabarrus County ever since and we are committed to keeping our charitable donations local. In the past, we gave by check or credit card. When we discovered the Foundation, we were able to establish a fund and utilize the online portal to easily select our favorite vetted charity and make a donation at the click of a button. This is so much more convenient and is done through our donor advised fund.

When we had to begin taking an annual RMD from our retirement account, we wanted to use it for charitable giving and utilize a similar method. Working with the Foundation, we have been able to donate our RMD directly to the Cabarrus County Community Foundation and leverage their informed grantmaking decisions. This keeps our funds local and allows us to avoid the tax implications."

—Gary and Karen Pensgen

Working Together, Giving Together

By Deviré Robinson, Vice President, Philanthropic Advancement



Deviré Robinson

FFTC's Center for Corporate Philanthropy recently introduced new ways to help companies and their team members achieve their charitable goals.

In addition to our signature FFTC Corporate Donor Advised Funds, which are flexible and efficient tools to manage a company's giving, we now offer three new options to supplement your charitable portfolio and help you meet other business goals:

- ▶ **FFTC Executive Donor Advised Funds** demonstrate your company's commitment to giving back by providing philanthropic dollars that executives can use for their own charitable giving.
- ▶ **FFTC Employee Engagement Donor Advised Funds** allow your employees to be part of funding decisions, so they feel engaged and proud to be part of your charitable giving.
- ▶ **FFTC Consumer Engagement Donor Advised Funds** increase customer loyalty by offering retail giving opportunities at checkout, both in-store or online.

Beyond donor advised funds, other FFTC solutions can also complement your company's giving strategy:

- ▶ **FFTC Scholarship Funds** provide the gift of education to deserving students and can be tailored to align with your company's priorities.
- ▶ **FFTC Community Impact Funds** provide permanent, strategic support for general cause areas—such as education, the environment or the arts. Choose a fund that aligns with your company's values and leverage FFTC's grantmaking expertise.
- ▶ **Private Foundation Capacity Building Services** support off-mission grantmaking, special initiatives and more, so you can make an even bigger impact.

Contact Deviré Robinson at drobinson@fftc.org or visit: fftc.org/Corporate



Panthers Charities donated to fund a multipurpose field at the new Miracle Park in Rock Hill, SC.



220 North Tryon Street
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www.fftc.org

**Inspiring Philanthropy.
Investing in Community.**



An Event to Remember

220 North Tryon at Foundation For The Carolinas offers unique, art-filled event spaces to celebrate holidays, retirements, weddings and other special occasions.

With an art gallery, sculpture garden and solarium overlooking expansive city views, 220 North Tryon can make your celebration an event to remember.

Contact us at events@fftc.org.

Revenue generated from our event spaces allows us to offer complimentary meeting space to local nonprofits and to share our gallery with the community.



at Foundation For The Carolinas

Visit fftc.org/Events for more information



FFTC Annual Meeting Returns Oct. 19

After a three-year hiatus, the Foundation's premiere philanthropic event—our Annual Meeting—will return, in-person, later this year. Save the date for this community celebration: October 19.

Seats will be available for purchase later this summer at www.fftc.org/AnnualMeeting. For sponsorship information, contact us at AnnualMeeting@fftc.org.

Other Programs & Events

We are pleased to continue offering learning opportunities that range from virtual discussions to in-person experiences.

Visit fftc.org/UpcomingEvents for info on future events and to access recordings of prior virtual programs.



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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