At the end of 2019, the stock markets were at an all-time high and the Community Foundation of Burke County had added eight new donor funds. The analysts projected a positive outlook for 2020, and everything was going as “planned.” Then, the unexpected happened and we found ourselves in a “never-dreamed-of” situation with COVID-19 – the virus with no vaccine that spread rapidly throughout the world.

Almost before we could understand the significance of this unprecedented time, we witnessed a huge drop in the market and many aspects of our daily lives changed drastically. Despite a discouraging outlook, our virus-altered landscape created unplanned opportunities for the Foundation. Suddenly, there were even more opportunities to make a difference in our community, opportunities we haven’t seen in years, opportunities to embrace change, and maintain a positive perspective.

Unexpectedly, our carefully thought-out plans and schedules for 2020 had to be reworked. We had a decision to make – pause or persevere. With the leadership of Nancy Taylor and collaboration from Burke County United Way, Camp Lake James Stewardship Fund, Grace Episcopal Foundation, Huffman-Cornwell Foundation, Rostan Family Foundation and Western Piedmont Foundation, we chose to persevere. With these collaborative partners, the Foundation established the COVID-19 Community Emergency Response Fund which began disbursing funds to nonprofits the first week of April 2020. We saw a tremendous outpouring of financial support from donors that was beyond our expectations.

The ability of the Foundation to immediately respond to the needs and changes caused by COVID-19 is humbling. It has been a pleasure to serve as President of the Board of Directors of the Community Foundation of Burke County. As I complete my final year and reflect back over the last several years, it is the past few months that have impacted me most. This time has been challenging and inspiring. During these unsettling times, please take time to look for the positives in our world and persevere on your own path to fulfillment and service.

If you or a nonprofit organization you are associated with has needs, please don’t hesitate to reach out to the Foundation.

“…opportunities to make a difference in our community; opportunities we haven’t seen in many years; opportunities to embrace change, and maintain a positive perspective.”

Mission Statement

To encourage, develop and participate in philanthropy by providing flexible giving opportunities, professional support and responsible stewardship for the benefit of donors and qualified recipients.
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Chris T. Brittain
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Martha McMurray-Russ
David A. Parker
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V. Otis Wilson, Jr.

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Phillip E. Church
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James H. Rostan
Rev. Diana Spangler-Crawford
Derinda P. Stiene
Benjamin S. Succop
Robert T. Turner, II
Edward D. Wall
Emily Williamson Gangi
Otto H. Woerner

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2019 Endowment Funds

**Animals**
Burke County Friends for Animals Endowment Fund

**Arts**
Burke Arts Council Endowment Fund
Caldwell Arts Council Endowment Fund
Caldwell Arts Council Limited Endowed Donor Advised Fund
The Rock School Arts Foundation Endowment Fund

**Broad Charitable Purposes**
Avery-Causby Fund
Donald and Betty Taylor Fund
Dorothy K. Ervin Endowment Fund
Emanuel A. and Romilda P. Richard Endowment Fund
Francis and Emily Grill Memorial Fund
George H. and Rose Marie Yount Endowment Fund
Jean Conyers Ervin Fund
Marilyn Malone Gordon Endowment Fund
Otto and Wynne Woerner Fund
William E. and Laura Ervin Smith Fund

**Cemetery Maintenance**
Mountain View Cemetery Fund
Quaker Meadows Cemetery Fund
Waldensian Presbyterian Church Cemetery Endowment Fund

**Culture/History**
Historic Burke Foundation-Alice Elaine Falls Endowed Fund
Historic Burke Foundation-Alice Elaine Falls Limited Endowed Donor Advised Fund
History Museum of Burke County Endowment Fund
History Museum of Burke County Limited Endowment Fund
Library Foundation of Burke County Endowment Fund

**Deaf and Hearing Impaired**
Albert Mehl Endowment Fund

**Donor Advised**
Bob and Susan Merrill Endowment Fund
Bowers-Greene Endowment Fund
Burke Sunrise, Inc. Limited Endowed Donor Advised Fund
Burke Women’s Fund
Camp Lake James Stewardship Fund
Charles M. and Alice M. Carey Fund
Chris and Leanne Brittain Family Fund
Christian Shull Children’s Endowment Fund
Cooper McCall Endowment Fund
Ellen and Rountree Collett Fund
Gresham Orrison Endowment Fund
Jackie and Paul Deaton Fund
James H. and Doris G. Edwards Endowment Fund
James H. Rostan and Linda R. Rostan Endowment Fund
Joel Hastings Endowment Fund
John P. Rostan, Jr. and Naomi Bounous Rostan Endowment Fund
Joyce Amos Jones Endowment Fund
Little Blue Fund
Mayas la nueva generacion-Mayas the Next Generation Fund
Morgan-Avery Fund
Norvell Family Fund
Rotary Club of Morganton Charitable Fund
Salsbury-Taylor Fund
Ted and Evelyn DeAugustinis Fund

**Education/Scholarship**
Adam Benson Scholarship Fund
Anita Wilson Scholarship Fund
Ann Cornwell Patton and George Thomas Cornwell Fund
Betty and Otto Woerner Endowed Scholarship Fund
Burke Education Endowment Program Endowed Fund
Cranford Scholarship Endowment Fund
Clyde Nichols Young, Jr. Endowed Scholarship Fund
Crump-Pollpeter Scholarship Fund
Darren Wilson Scholarship Fund
Drexel Alumni Association Fund
Glenn R. Yoder Scholarship Endowment Fund
Jimmy C. Draughn Scholarship Endowment Fund

Please consider making a donation to one of these endowments.
Community Foundation of Burke County

Keith Warren Black Educational Scholarship Fund
Larry and Louise Huffman Scholarship Endowment Fund
Larry Simpson Memorial Scholarship Fund
Margaret Franklin Scholarship Fund
Michael Williamson Eley Endowment Fund
Mildred and Hugh Fletcher Scholarship Fund
Morganton Day School Scholarship Endowment Fund
Raymond K. Miller Scholarship Endowment Fund
Robert A. “Bob” Shook Memorial Scholarship Fund
Rotary Club of Morganton Scholarship Endowment Fund
Ruth Bolick Christian Scholarship Fund
St. Stephen's Episcopal Church Miss Annie Avery Scholarship Fund
The North Carolina School of Science and Mathematics – Morganton Fund
Tim Spain Scholarship Fund
Valdese Rotary Club Endowed Scholarship Fund
Waldensian Presbyterian Women Scholarship Program Endowment Fund
Wynne and Otto Woerner Endowed Scholarship Fund

Environment
Foothills Conservancy of North Carolina Burke County Endowment Fund
Martha’s Park Endowment Fund

Healthcare
Burke Hospice & Palliative Care Endowment Fund
Burke Hospice & Palliative Care, Inc. Limited Endowed Donor Advised Fund
Burke Hospice & Palliative Care, Inc. Limited Endowed Donor Advised Fund II
Good Samaritan Clinic Endowment Fund
Ron LaSalle Limited Endowment Fund for Charitable Care
Stop Alcohol and Drug Addiction Endowment Fund
Teeth in Need Endowment Fund

Human Services
Andrea Galen Jacks Endowment Fund
Blue Ridge Community Action Fund
Burke Charitable Properties Limited Endowed Donor Advised Fund
Burke County United Way Fund
Burke United Christian Ministries Limited Endowed Donor Advised Fund
Children’s Home Society of North Carolina Limited Endowed Fund
Drew Woerner Endowment Fund
Foothills Service Project Limited Endowed Donor Advised Fund
Habitat for Humanity of Burke County, Inc. Fund
Options Against Family Violence Fund
Ray and Laura Conley Endowed Fund
Southmountain Children and Family Services Endowment Fund
W. Edwin & Marie T. Hoyle Endowed Fund

School Nurse Program/Nursing Scholarship
Minnie Belle Rector Cooper Nursing Scholarship Fund
Stiff Endowment Fund

Religion
First Presbyterian Church Morganton Limited Endowed Donor Advised Fund
George Lewis “Jake” and Annie Taylor Paschall Endowment Fund
Waldensian Presbyterian Church Endowment Fund
Walter Howard Lewis Endowment Fund

Travel Fellowship-First Baptist Church Morganton
Jerald C. Liebhart, Sr. & Grace Folmar Liebhart Fund

Unrestricted
Betsy and Billy Joe Patton Endowment Fund
Bill and Hazel Bailey Abernathy Endowment Fund
Carl H. and Linda S. Wall Endowment Fund
Donald Jackson McCall Endowment Fund
F. Sam and Phyllis Rogers Fund
John L. and Caroline W. Kos Fund
John W. Ervin, Jr. Endowment Fund
Pat and Harold Mitchell Fund

Please visit www.cfburkecounty.org to donate online.
Letter from our Executive Director

Even though we find ourselves in extraordinarily challenging times as we confront “Life with COVID-19” in 2020, it is important to reflect and celebrate the advances made by the Foundation in 2019.

In 2019, our total gifts for charitable purposes increased by fifty-five percent (55%) over the previous year. Total charitable gifts were $1,378,361 for 2019, versus $889,912 for 2018. Twenty-seven percent (27%) of those gifts were directed toward improving human services and twenty-two percent (22%) of those gifts were directed toward charitable purposes. Eighty-five percent (85%) of those gifts remained in Burke County to assist in meeting the needs of our citizens.

In 2019, we also saw an increase of eight new endowed funds that were established at the Foundation, bringing our total number of endowment funds held to 115.

Also, the Foundation continued its commitment to nonprofits who serve Burke County. By hosting scheduled meetings, the organizations were able to share their challenges and needs. As a result, the Foundation responded to the nonprofit leaders’ request and created a Nonprofit Directory (found on our website at www.cfburkecounty.org).

In May of 2019, the Board of Directors was honored to welcome Suzanne Friday, the Managing Director, National Standards and Vice President of Legal Affairs for the Council on Foundations. She provided the Board with legal updates that were relevant to community foundations.

In June of 2019, the Foundation moved its offices to 123 North Sterling Street due to needed additional space for growth. Chip Black, Board member and former Board Chair, was recognized for his commitment to the Foundation and gift of office space for the Foundation for seventeen years. There was consensus from the Board that this allowed the Foundation to grow its assets while minimizing expenses.

In September of 2019, the Board of Directors approved and seeded the North Carolina School of Science and Mathematics – Morganton Fund, to support the work and needs, exclusive of capital projects, of the school. These funds were made available through the unrestricted funds held by the Foundation.

Also, in September of 2019, the Foundation implemented scholarship software for students to apply online. Even though it was a tedious and rigorous process, we increased the number of applications submitted by more than one-hundred percent (100%). A total of 551 student applications pursuing a higher education were received.

In the following pages, you will read about the compelling work that the Foundation, the Burke Women’s Fund, and the Burke Youth Organized Philanthropists are doing in our community. You will also have the opportunity to become acquainted with some of the 2019 scholarship recipients.

Without the continuing commitment of our donors and community, our work would not be possible. It remains my privilege to serve as your Executive Director.

Learn more about the Community Foundation

If you know a group that might enjoy learning about us, please contact Nancy W. Taylor at 828-437-7105. We have a brief 15-20 minute presentation that explains how the Foundation works and how anyone can become a philanthropist.
On October 10, 2019, the Board of Directors of the Community Foundation of Burke County (CFBC) held its annual event to recognize donors and the 2019 grantees. The featured speakers were Nancy J. Cable, Ph.D., Chancellor, University of North Carolina Asheville, and Kevin Baxter, North Carolina School of Science and Math (NCSSM) Director of Western Campus Planning and Project Management, North Carolina School of Science and Math, Western Campus. Dr. Cable shared the exciting new strategic direction and growth that the University of North Carolina Asheville was experiencing and Mr. Baxter provided an update on the construction of the NCSSM western campus located in Morganton.

Recipients of the grants from the 2019 Competitive Grant Cycle were also recognized. Grant recipients included: American Red Cross, Baptist State Convention of North Carolina – Oak Ridge, Blue Ridge Community Action, Burke Augustine Literacy Project, Burke Charitable Properties, Burke County Literacy Council, Burke Hospice and Palliative Care, Catawba Science Center, Foothills Conservancy of North Carolina, Inc., Options, Inc., Prevent Blindness North Carolina, Repay Inc., and Southmountain Children and Family Services. CFBC awarded $137,528 in grants to these nonprofits.

During the annual meeting, donors were recognized via a video tribute displaying their commitment to charitable causes and the communities in which they live.
Anita Wilson Scholarship

The Anita Wilson Scholarship was initially established at the First United Methodist Church in Morganton by Henry L. Wilson. Mr. Wilson wanted to honor the life of his wife, Anita, and her love of music. The scholarship fund was transferred to the Community Foundation of Burke County in 2017. The purpose of the scholarship is to provide financial resources for the higher education of a Burke County student pursuing a degree in Music Performance or Music Education.

Peyton Wheeler, a graduate of Freedom High School, was the 2019 recipient of the Anita Wilson Scholarship. During her time at Freedom, Peyton was active in the Freedom High School Chorus, the Anchor Club, and the National Honor Society. Peyton is now attending UNC at Greensboro where she is majoring in Voice Performance or Music Education.

Clyde Nichols Young, Jr. Scholarship

Clyde Nichols Young, Jr., taught math in Burke County from 1957 until his retirement in 1990. He began his career at Salem High School before becoming a charter member of the Freedom High School Faculty. He was the Chairman of the Math Department at Freedom High School from 1981 until 1990.

Donald J. Pepka, a graduate of Freedom High School, was the recipient of the 2019 Clyde Nichols Young, Jr. Scholarship. During his sophomore – senior years at Freedom, Donald was a member of the School Math Team and the Quiz Bowl Team. He was also a member of the American Regions Mathematics League (ARML) during his freshman year.

Donald is now attending Duke University where he is pursuing his interests which include a continued focus on math, literature, and social justice.

Cranford Scholarship

The Cranford Scholarship was established by Paul Cranford in memory of his nephew, Eric, and his brother, Fred. It was very important to Mr. Cranford that this scholarship provide resources to a senior at East Burke High School or Jimmy C. Draughn High School who wanted to attend college.

Trey Blackwood, a graduate of East Burke High School, was one of the 2019 Cranford Scholarships. While at East Burke High School, Trey was involved in the Student Government Association, the National Honor Society, the Swim Team and the Band. Trey is currently enrolled at Appalachian State University, majoring in political science. Trey is a Senator in the Student Government Association. This year, his courses include Political Science, Rhetoric and Composition, Religion, and Sociology.

Larry and Louise Huffman Scholarship

As teachers, Larry and Louise Huffman devoted their lives to serving others, especially the youth of Burke County. In tribute to this genuine concern and compassion for young people, the Huffman family founded the scholarship, with the support of the East Burke Kiwanis Club. It was established to provide financial support to graduating seniors or students already enrolled in college.

Alexi M. Card, a graduate of East Burke High School, was the recipient of the 2019 Larry and Louise Huffman Scholarship. Alexi is now attending Appalachian State University where she is majoring in English Education.

Since 2000
475 Scholarships
$562,522
2019 recipient of the Larry and Louise Huffman Scholarship. During her time at East Burke High School, Alexi was a member of the Soccer Team, the Swim Team, the Marching and Concert Bands, and the JROTC.

Alexi is currently attending Gardner-Webb where she is majoring in Exercise Science and Preventative and Rehabilitative Health Sciences. Her coursework includes Human Anatomy and Physiology, Introduction to Exercise Science, and Psychology.

**Stiff Endowment Fund Scholarship**

Dr. Olin Stiff practiced medicine at Valdese General Hospital for more than forty years. Dr. Stiff delivered more than 8,000 babies and assisted in surgery on a daily basis. Mrs. Stiff assisted Dr. Yates Palmer in surgery for two years before the Stiffs started their family. The Stiff Scholarship was established to offer assistance to Burke County residents who are committed to completing a four-year degree in Nursing.

Sarah Cooper, a graduate of Burke Middle College, was one of the 2019 recipients of the Stiff Scholarship. She attends Caldwell Community College and Technical Institute where she is pursuing an Associate's Degree in Nursing. Lindsey Cales, a graduate of East Burke High School, was the other recipient of the 2019 Stiff Scholarship. She attends Caldwell Community College and Technical Institute where she is pursuing an Associate's Degree in Nursing.

Jahdiel Reyes, a graduate of Burke Middle College, was one of the recipients of the 2019 Wynne and Otto Woerner Scholarship. During his time at Burke Middle College, he was a member of the National Honor Society, a member of the Quiz Bowl Varsity Team, and a member of the Burke Youth Organized Philanthropists.

Jahdiel is now attending UNC at Chapel Hill where he is pursuing his dream of becoming a nurse. His coursework includes Human Anatomy and Principles of Biology.

Kyle Cox, a graduate of McDowell High School, was also a recipient of the 2019 Wynne and Otto Woerner Scholarship. While at McDowell High School, he was a member of the Science Olympiad Team and the Environmental Club.

Kyle is now attending UNC Asheville where he is pursuing a Bachelor's Degree in Environmental Studies. His courses include Chemistry and Precalculus.
2019 CFBC Competitive Grant Cycle Recipients


Front Row - left to right | Elaine Lite– Prevent Blindness of North Carolina, Renee Lewis – Repay, Inc., Beth Walker – American Red Cross, Kristy Graf – Options, Inc., Tracy Hall – Catawba Science Center, Sharon Leftwich – Burke County Literacy Council, Myschell Pearson – Burke Hospice and Palliative Care, Wendy Jodry – Southmountain Children and Family Services, Sara Black Moses – Community Foundation of Burke County

Not Pictured | Stephanie Ashley – Blue Ridge Community Action
Burke Youth Engage In Philanthropy

In the fall of 2019, Burke Youth Organized Philanthropists (BYOP) entered their fourth year of operation. The program is open to Burke County students, grades nine to twelve, who are enrolled in Burke County Public Schools or a recognized homeschool. Sara Black Moses, a native of Burke County, and a Board member of the Community Foundation of Burke County (CFBC), serves as Volunteer Director.

BYOP completed its competitive grant cycle in June and awarded five grants to organizations who presented programs or projects that impacted the lives of children, ages 0-18, and their families. Recipients of the grants were: Burke United Christian Ministries (i.e., to purchase laundry detergent and laundry vouchers); First United Methodist Church of Valdese (i.e., to provide funds for its Backpack Feeding Ministry; Foothills Conservancy of North Carolina, Inc. (i.e., to provide funds for program staff and art materials for “Our Big Backyard”); Ronald McDonald House of Charlotte, Inc. (i.e., to provide funds for Burke County families staying at the Ronald McDonald House in Charlotte); the Outreach Center (i.e., to purchase supplies for lessons/activities associated with the W.O.W. Children’s Victory Garden Project); and TOSS (i.e., to provide funds for the TOSSworks program at Forest Hill Elementary School).

Members of BYOP must go through an interview process to be considered for membership. Once a student becomes a member of BYOP, he/she gains knowledge relating to local nonprofits, financial operations of nonprofits, and the needs of children and their families who live in Burke County.

2018-2019 BYOP Members

Back Row - left to right: Sara Black Moses, Samuel Kuehnert, Gillian Abee-Freeze, Dorian Gregory, Sterling Hall, Skye Scoggins, Zack Heile

Front Row - left to right: Onyx Velez, McKenzie Krueger, James Collett, Ella Evans, Owen Streppa

Not Pictured: Nick Corn, Charlie Gessner

2019-2020 BYOP Members

Sara Black Moses
Since 2009, the Burke Women’s Fund (BWF), operating under the auspices of the Community Foundation of Burke County, has focused on issues that impact the lives of women and their families. As of December 31, 2019, BWF has awarded more than $308,480 to nonprofit agencies who are addressing those needs.

On March 31, 2019, the BWF held its annual celebration at the Morganton Community House to recognize 2019 grant recipients. The featured speaker was Julie Honeycutt, Executive Director of HopeRX, a nonprofit organization located in Henderson County, NC. The topic was ‘Keeping Hope Alive Saves Lives” and focused on long-term and sustainable plans that addressed substance misuse and underage drinking. Averi Ritchie and Brian Horton, representatives from the Western Piedmont Council of Governments, provided an update on the 2018 grant they received from the BWF that assisted with the implementation of the fixed route public transportation service in Burke County.


At year end, the Burke Women’s Fund had increased their endowment fund to $148,908. In so doing, BWF continued to ensure the long term vision of advancing the power of collective giving among Burke County women for years to come.

2019 BWF Steering Committee Members
Back Row - left to right | Kelle Huffman, Jane Moody, Beth Heile, Da-Vida Roseman
Front Row - left to right | Cecelia Surratt, Leslie Rostan, Mary Charlotte-Safford, Marsha Carver, Golnush Sharafsaleh, Amber Mank
Not Pictured | Tamika Garrison, Lisa Miller, Mary Ellen Wiese
Burke Women’s Fund Networking Meeting

Burke Women’s Fund Celebration Event

Many Thanks to our Corporate Sponsor

Carolinas HealthCare System
Blue Ridge
Statement of Financial Position

<table>
<thead>
<tr>
<th></th>
<th>2019 Total</th>
<th>2018 Total</th>
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<tbody>
<tr>
<td><strong>Assets</strong></td>
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<td></td>
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<tr>
<td><strong>Current assets:</strong></td>
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<tr>
<td>Cash and equivalents</td>
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<td>Short-term investments</td>
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<td>Promises to give</td>
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<td>Other receivables</td>
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<td>Prepaid expenses</td>
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<td>Land held for sale</td>
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<td>Cash surrender value of life insurance</td>
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<td>Total assets</td>
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<td>20,044,258</td>
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<td><strong>Liabilities and Net Assets</strong></td>
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<td><strong>Current liabilities:</strong></td>
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<td>Accounts payable</td>
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<td>Grants payable</td>
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<td>Unrestricted</td>
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<tr>
<td>Discretionary</td>
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<td>Board designated</td>
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<tr>
<td>Donor advised</td>
<td>349,185</td>
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<td>Total without donor restrictions</td>
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<td>With donor restrictions</td>
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<td>With donor restrictions - perpetual endowment</td>
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<td>Total net assets</td>
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<tr>
<td>Total liabilities and net assets</td>
<td>23,993,684</td>
<td>20,044,258</td>
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## Statement of Activities

<table>
<thead>
<tr>
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<th>2019 Total</th>
<th>2018 Total</th>
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<tbody>
<tr>
<td><strong>Revenues and other support</strong></td>
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<tr>
<td>Contributions</td>
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<td>Investment income</td>
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<td>Net realized and unrealized gains on investments</td>
<td>3,664,641</td>
<td>(2,097,788)</td>
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<td>Change in cash surrender value of life insurance</td>
<td>(52)</td>
<td>(6)</td>
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<tr>
<td>In-kind contributions</td>
<td>12,696</td>
<td>15,269</td>
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<tr>
<td>Other</td>
<td>685</td>
<td>570</td>
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<tr>
<td><strong>Total revenues and other support</strong></td>
<td><strong>5,584,587</strong></td>
<td><strong>(324,727)</strong></td>
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</tbody>
</table>

| **Expenses**                   |              |              |
| Program services               | 1,569,030    | 1,043,202    |
| Management and general         | 121,150      | 105,262      |
| Pledge cancellations           | 365          | 487          |
| **Total expenses**             | **1,690,545** | **1,148,951** |
| Increase (decrease) in net assets | **3,894,042** | **(1,473,678)** |

| Net assets at beginning of year | 20,034,933 | 21,508,611 |
| Net assets at end of year      | 23,928,975 | 20,034,933 |