“In the middle of difficulty lies opportunity.”

– ALBERT EINSTEIN
In 2023, the professional and volunteer leadership of the Community Foundation of Burke County has reflected on what we have been, what we are today, and what we want to be moving forward. We have engaged in strategic and long-range planning in an effort to be the strongest possible philanthropic organization we can be in service to the members of this community. That word “community” encompasses every age group, every socioeconomic group, every ethnic group, ALL of us!

At our Strategic Planning Retreat in May, guest speaker McCray Benson, President/CEO of the Henderson County Community Foundation, told us that “identify and focus are two different things.” The Community Foundation has worked with county and municipal officials as well as local nonprofit organizations to identify some of the most serious issues we face, but we are also working diligently to focus on effective strategies to address these issues. Under the leadership of our President/CEO Nancy Taylor, our staff is engaged in tireless efforts to provide support in a variety of forms to nonprofits as well as facilitating conversations and cooperation between stakeholders on the complex problems facing our community. Sometimes, the Foundation’s most important role is to get the right parties in the room or at the table and let them use their expertise to work together to find solutions. Our Board and committee members are actively involved in addressing issues such as affordable housing, childhood poverty, transportation, and homelessness. Our Burke Youth Organized Philanthropists are leading the way on issues that affect young people, especially in the area of teen mental health. The Community Foundation is constantly looking for ways to effectively connect people and facilitate collaboration, to help get us all out of our silos and work together, to engage with each other in ways that will have a positive effect on this community.

Over the last decade, the Community Foundation of Burke County has emerged as a model of stability and reliability for donors who desire sound financial stewardship of their dollars coupled with positive community impact. The efforts of our President/CEO and Board to cultivate new funds, along with the expertise of the CFBC Investment Committee, have tripled our assets in the last ten years. We are one of only 12 community foundations in the state of North Carolina to meet the criteria set by the National Standards for US Community Foundations, and we are a member of the Council on Foundations. This year, our Scholarship Committee reviewed 630 applications and awarded 67 scholarships to deserving young people who will lead this community in the future.

The Community Foundation of Burke County is working hard daily to retain the confidence of our donors, to assist all parties in the search for solutions to the challenges we face, and to promote the development of our financial, human, and service capital as we work together to build a brighter future for our community and our people. THANK YOU for your support!

**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.
Throughout 2022 the Community Foundation of Burke County (CFBC) focused on systemic issues impacting Burke County. Multiple task forces, convened by CFBC, continued their work throughout the year to address homelessness, affordable housing, childhood poverty and transportation. Margaret J. Wheatley, a writer, management consultant and Harvard University graduate states: “Yet, we act as if simple cause and effect is at work. We push to find one simple reason things have gone wrong. We look for one action, or the one person, that created this mess. As soon as we find someone to blame, we act as if we’ve solved the problem.” The Foundation acknowledges that there is no one person at fault and that answers and solutions come only when communities work together for the greater good.

In 2022, representatives from Burke and McDowell, came together to better understand the needs of the homeless population and the impact on our counties. While there are no simple answers, nor a single person or organization responsible, there are stakeholders committed to identifying interventions that will address the needs of this population and their communities.

Representatives from the Family Infant Preschool Program (FIPP) continued their work on the Childhood Poverty Community Assessment and Mapping Project. It has focused on identifying key demographics, existing resources/services available to Burke’s children living in sparseness and making recommendations to address identified issues. The results of this two year project will be shared with the community and it is anticipated that the Foundation will convene a task force to follow-up on the suggested actions.

Other highlights of the 2022 year included
- Distributed more than $1.1 million in grants to nonprofit organizations
- Received contributions in excess of $13.5 million
- Established the Affordable Housing Task Force
- Established the Waldensian Presbyterian Church Limited Endowed Fund
- Funded a $5,000 Burke Youth Organized Philanthropists grant to the Burke Council on Alcoholism and Chemical Recovery to develop educational programs for Burke’s students on the dangers of vaping
- Funded $50,000 to Open Hearts Place to construct affordable housing
- Awarded 58 Scholarships totaling $103,815

The generous support of our donors and volunteers allows the Foundation to consistently pursue solutions that address systemic issues, provide scholarships to deserving students and award grants to nonprofit organizations that support the needs of our community. I remain grateful to all who support the mission of the Community Foundation of Burke County.
Board Members
Elizabeth W. Andrews  J. J. David Fletcher  M. Alan LeCroy  J. Mark Rostan
John F. Black, Jr.  John M. Heilman  Martha McMurray-Russ  David R. Wiese
Chris T. Brittain  Kelle B. Huffman  Sara Black Moses  V. Otis Wilson, Jr.
Richard L. DeAugustinis  Naomi W. Hunt  David A. Parker

Board Members Emeritus
John T. Branstrom  John W. Ervin, Jr.  James E. Lowdermilk  Rev. Diana Spangler-Crawford
William M. Brinkley  Le N. Erwin  Donald J. McCall  Derinda P. Stiene
Cynthia H. Callaway  J. Hugh Fletcher  Nettie M. McIntosh  Benjamin S. Succop
Phillip E. Church  Doris L. Fullwood  Marcus W. H. Mitchell, Jr.  Robert T. Turner, II
J. Rountree Collett, Jr.  Susan L. Haire  W. Harold Mitchell  Edward D. Wall
Sterling R. Collett, III  Charles E. Horton  Barbara C. Norvell  Emily Williamson Gangi
P. Paul Deaton  Jack B. Kirksey  Susan C. Pollpeter  Otto H. Woerner
Elisabeth C. Ervin

Community Committee Members
Amparo R. Alfaro  J. Rountree Collett, Jr.  Rhonda F. Lee  James H. Rostan
Catherine R. Bell  Katherine E. Fletcher  George K. Logan  Mark K. Miller
John T. Branstrom  Hayley B. Greene  Rexanna P. Lowman  Kelly M. Snipes
Caroline W. Butler  Jordan N. Greene  Susan C. Pollpeter  Steven M. Witte
Paul J. Carlson  Bruce N. Hershock  Chasity Poteat-Rice
Phillip E. Church  Hannah M. Johnson
On October 25, 2022, the Board of Directors of the Community Foundation of Burke County (CFBC) held its annual event at the Community House in Morganton. The featured speakers were Molly J. Hemstreet, Founder of The Industrial Commons, Rev. Dr. Marshall A. Jolly, Vice Chair of Mission Ministries Alliance, and Dr. Joel D. Welch, President of Western Piedmont Community College.

Dr. Welch provided an update on the status of the Construction Trades Solution Center. It will be used for training in carpentry, masonry, electrical technologies, HVAC, plumbing and green constructions principles. The Rev. Dr. Marshall A. Jolly announced the creation of Mission Ministries Alliance whose mission is to address the needs of the homeless populations in Burke and McDowell counties. Molly J. Hemstreet shared the mission of The Industrial Commons. It brings workers and manufacturers together to find triple-bottom line solutions to entrenched manufacturing issues.

Recipients of the grants from the 2022 Competitive Grant Cycle were also recognized. Grant recipients included: Big Brothers Big Sisters of Western North Carolina, Burke Augustine Literacy Project, Burke Charitable Properties, Casting for Hope, Catawba Riverkeeper Foundation, Center for Rural Health Innovation, Foothills Conservancy of North Carolina, Friends of the Valdese Rec, Good Samaritan Clinic, MedAssist of Mecklenburg, Olive Hill Economic Development Corporation, Open Hearts Place, Options, Inc., Ronald McDonald House of Charlotte, Inc. and The Meeting Place One, Inc. CFBC awarded $164,474 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 and serve.
2022 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
Bob and Susan Merrill Endowment 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
Jacqueline and Paul Deaton Endowment Fund
Jean Conyers Ervin Fund
John and Janice Rostan Endowment Fund
Lloyd E. and Helen M. Wallace Endowment Fund
Marilyn Malone Gordon Endowment Fund
Mary Lou Sossoman Endowment Fund
Otto and Wynne Woerner Fund
Rachel C. Keisler Fund
Wildcats Legacy 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
History Museum of Burke County Limited Endowment
Library Foundation of Burke County Endowment Fund

Deaf and Hearing Impaired
Albert Mehl Endowment Fund

Donor Advised
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
Jack’s Fund
James H. and Doris G. Edwards Endowment Fund
James H. Rostan and Linda R. Rostan Endowment Fund
Janice H. Rostan Endowment Fund
Jean B. and Frederick M. Riggs, Sr. Endowment Fund
Joel Hastings Endowment Fund
John P. Rostan, Jr. and Naomi Bounous Rostan Endowment Fund
Joyce Amos Jones Endowment Fund
Kath-Dyer Fund
Little Blue Fund
Mayas la nueva generacion-Mayas the Next Generation
Morgan-Avery Fund
Norvell Family Fund
Rotary Club of Morganton Charitable Fund
Salsbury-Taylor Fund
Ted and Evelyn DeAugustinis Fund
The J. Alex and Vivian G. Mull Foundation Charitable Fund
The Martin Luther Fund

Education/Scholarship
Adam Benson Scholarship Fund
Anita Wilson Scholarship Fund
Ann Cornwall Patton and George Thomas Cornwall Fund
Azmi S. Jarrah Scholarship Endowment Fund
Barrett L. and Diana S. Crawford Scholarship 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
Erin’s Memorial Scholarship Fund

Please consider making a donation to one of these endowments.
### Education/Scholarship
- Freddy G. Leger Memorial Scholarship Fund
- Gertrude Hire Scholarship Fund
- Glenn R. Yoder Scholarship Endowment Fund
- Jean B. and Frederick M. Riggs, Sr. Scholarship Fund
- Jimmy C. Draughn Scholarship Endowment Fund
- Keith Warren Black Educational Scholarship Fund
- Larry and Louise Huffman Scholarship Endowment Fund
- Larry Simpson Memorial Scholarship Fund
- Margaret Franklin Scholarship Fund
- Martha and Ron Franklin Music Scholarship Fund
- Michael Williamson Eley Endowment Fund
- Mildred and Hugh Fletcher Scholarship
- Morganton Day School Scholarship Endowment Fund
- Nathan Alan Williams Scholarship Fund
- Norvell Family Fund – Libby Enos Norvell Educational Scholarship
- Norvell Family Fund – Paul J. Koehnke Fine Arts Scholarship
- Raymond K. Miller Scholarship Endowment Fund
- Robert A. “Bob” Shook Memorial Scholarship
- Rotary Club of Morganton Scholarship Endowment Fund
- Ruth Bolick Christian Scholarship Fund
- Smith-Nanney Scholarship Fund
- St. Stephen’s Episcopal Church Miss Annie Avery Scholarship
- 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
- Friends of the Valdese Rec Fund
- Martha’s Park 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 Wöerner Endowment Fund
- Foothills Service Project Limited Endowed Donor Advised Fund
- Habitat for Humanity of Burke County, Inc. Fund
- Habitat for Humanity Burke County
- Options Against Family Violence Fund
- Ray and Laura Consley 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
- Calvary Youth Endowment Fund
- Edna Daves and Thomas Jackson McCall Endowment Fund
- First Presbyterian Church Morganton Limited Endowed Donor Advised Fund
- George Lewis “Jake” and Annie Taylor Paschall Endowment Fund
- Loy Ray, Jr. and Doris Pons Burris Endowment Fund
- Waldensian Presbyterian Church Endowment Fund
- Waldensian Presbyterian Church Limited Endowed Agency 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.
Hannah Seagle was one of the first members of the Burke Youth Organized Philanthropists (BYOP). Hannah is currently pursuing her PhD in human genetics at Vanderbilt University. Following her graduation from Wake Forest University with a Bachelor of Science in Biochemistry and Molecular Biology, Hannah worked as an Infectious Disease clinical study coordinator at Atrium Health Wake Forest Baptist. The skills Hannah learned as a member of BYOP were used as she tutored children from underserved populations and worked with Hire Heroes USA, helping veterans and their families. Having recently moved to the Nashville area, Hannah plans to continue serving her community, as BYOP experiences inspired her to do.

Tripp Causby joined BYOP in 2016 and graduated in 2022 from Wake Forest University with a Bachelor of Science in Biochemistry and Molecular Biology. In August of 2022, Tripp became an inaugural member of the Public Health AmeriCorps program through Wake Forest and the Center for Communicable Disease. He served over 900 hours at the Community Care Center, the largest free health clinic in North Carolina. Tripp also served at Whole Man Ministries in Winston-Salem, a nonprofit organization that serves low-income and homeless individuals and families. During his tenure there, he received a $475,000 grant to implement the Whole Man Ministries mission (providing essential services for the most vulnerable in Winston-Salem.) As Tripp continues his education at East Carolina University’s Brody School of Medicine, he is thankful for his initial exposure to philanthropic work via BYOP. In fact, BYOP served as a catalyst for his passion to serve.

Zack Brittain was also one of the first members of BYOP and graduated from the University of North Carolina in 2021. Upon graduation, Zack found his passion working at national football league stadiums in the area of event/crowd management. He maintained a commitment to service by volunteering in the children’s ministry of his church, participating in various international church related projects, and supporting local needs of the community. Zack has recently transitioned from event/crowd management to a career in real estate.

Beth LeCroy joined BYOP in 2016 and graduated in 2022 from Wake Forest University with a Bachelor of Arts degree in English. During her time at Wake Forest, Beth volunteered weekly at a local Winston-Salem elementary school and helped lead their afterschool program. Beth also spent one summer as an AmeriCorps associate at HOPE Fair Housing, a nonprofit organization in Illinois. The nonprofit knowledge she gained at BYOP was particularly helpful to her in her volunteer roles. She also had the opportunity to serve one summer for the Governor’s Office of North Carolina and gained knowledge about the work of state government. Beth will attend law school at the University of North Carolina-Chapel Hill in the fall and plans to apply legal knowledge to areas of service.
Where are they now?

2022 Scholarship Recipients

Keith Warren Black Scholarship - Supporting Higher Education in Burke County
The Keith Warren Black Scholarship was established in 2014 by Lynn M. Black to honor the life of Keith Warren Black and his dedication to education. This scholarship provides financial assistance to students at Western Piedmont Community College (WPCC). Mr. Black graduated from Parsons College with a degree in Education, earned his Master’s in Special Education at the University of Northern Iowa and pursued postgraduate work at the University of Iowa. The scholarship is awarded to an individual enrolled full-time at WPCC. Preference is given to a member of, or student whose parents or grandparents are or were members of Calvary Lutheran Church in Morganton, NC. The 2022 recipient of the Keith Warren Black Scholarship was Aiden Hunt.

Cranford Scholarship Endowment Fund - Supporting East Burke and Jimmy C. Draughn High School Seniors
The Cranford Scholarship was established in 2013 by Paul Cranford to honor the life of his brother, Dr. Fred Cranford and his nephew, Eric Cranford. Dr. Cranford was a retired educator from the Burke County Public School System. Eric Cranford served in the United States Navy and lost his life when Airline Flight 77 crashed into the Pentagon in 2011. This scholarship provides financial assistance to four seniors graduating from East Burke High School and four seniors graduating from Jimmy C. Draughn High School. The recipients of the 2022 Cranford Scholarship were: McKinley Clark, Addison Hart, Elijah Harrison, Lindsey Hodge, Mattie Jensen, Olivia Lambert, Zoie Smith and Preston White.

Margaret Franklin Scholarship - Supporting Freedom and Robert L. Patton High School Seniors
The Margaret Franklin Scholarship was established in 2020 by Benny Franklin to honor the life of his wife, Margaret Franklin. Mrs. Franklin devoted her life to teaching and caring for the young people of Burke County. This scholarship provides financial assistance to a Freedom or Robert L. Patton High School senior who plans to major in education. Preference is given to one majoring in elementary education and attending a two or four-year North Carolina college or university. The 2022 Margaret Franklin Scholarship recipient was Savannah Epley.
In 2022, the Burke Women’s Fund (BWF) celebrated its reappearance into the community after COVID. Since 2009, the BWF has awarded $378,623 in grants to qualified Burke County nonprofits focused on providing services to women and their families.

On June 5, the BWF hosted a meeting at the Valdese Lakeside Park located at 1149 Lake Rhodhiss Dr., NE, in Valdese. President of Friends of the Valdese Rec, Beth Heile, took attendees on a hike along the greenway. Then, the group gathered in the park’s Open Green to hear from several of BWF’s prior grantees.

On September 25, the BWF sponsored a book club event at Adventure Bound Books in downtown Morganton. The dialogue was focused on *The Book Woman of Troublesome Creek* by Kay Michel Richardson. Also, BWF Steering Committee Member Ashley Brown led a discussion on the social hierarchies that have governed women.

During 2022, the Burke Women’s Fund endowment fund balance was $157,162. BWF maintained its focus on advancing the power of collective giving among Burke County women.
The Burke Youth Organized Philanthropists (BYOP) entered its seventh year of operation in the Fall of 2022. Thirteen high school students from across Burke County served on the committee. Sara Black Moses, Board member of the Community Foundation of Burke County (CFBC), served as Volunteer Director for BYOP. She guided the students through multiple educational sessions that included learning about local nonprofits, conducting needs assessments focused on young people, and assembling information for the BYOP annual grant cycle.

BYOP awarded $9,957 to deserving nonprofits for the competitive 2022-2023 grant cycle. Student members reviewed grant applications, developed questions, interviewed all applicants and confirmed that their requests would serve children, ages 0-18, and their families. The grants awarded were: $3,000 in funding for NC Cooperative Extension Burke 4-H to support a babysitter certification program; $725 in funding for Old Colony Players to provide scholarships for a children’s summer theatre program; $2,500 for Southmountain Children and Family Service’s foster children to experience summer outings; $1,000 for First United Methodist Church – Valdese to support their Backpack Feeding Program; $2,500 for Ronald McDonald House of Charlotte, Inc to house Burke County families; and $232 for Friends of the Valdese Rec to support a plein air painting program.

BYOP is funded by the Foundation and private donors to encourage the involvement of young people in helping meet the needs of Burke County children, ages 0-18. While learning how philanthropy can play a role in impacting the lives of Burke County children and their families, the young philanthropists are developing lifelong principles of service.
2022 Total Grants
Endowed, Limited Endowed, Burke Women’s Fund, Burke Organized Youth Philanthropists, and Unrestricted

In 2022, $1,138,484 in grant funding was distributed to qualified nonprofit agencies and organizations. Human Services received the largest allocation (33%).

ENDOWED FUNDS CREATED IN 2022

Jean B. and Frederick M. Riggs, Sr. Scholarship Fund – Established in February of 2022 to financially support Burke County High School and Burke Middle College students who have a strong desire to achieve a higher education.

Jacqueline and Paul Deaton Endowment Fund – Established in March of 2022 to provide annual distributions to designated charitable organizations.

Rachel L. Keisler Fund – Established in March of 2022 to provide crisis assistance to individuals and families through nonprofit organizations.

Habitat for Humanity of Burke County – Established in April of 2022 to support the work and operations of Habitat for Humanity of Burke County, Inc.

Calvary Youth Endowment Fund – Established in November of 2022 to provide annual distributions to Calvary Lutheran Church for its youth programs and youth needs.

Waldensian Presbyterian Church Limited Endowed Agency Fund – Established in December of 2022 to provide distributions to the Waldensian Presbyterian Church for discretionary purposes as approved by the Session of the Waldensian Presbyterian Church.

John and Janice Rostan Endowment Fund – Established in December of 2022 to provide support for broad charitable purposes.

Learn more about the Community Foundation

If you know a group who 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.
## Statement of Financial Position

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<tr>
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<th>2022 Total</th>
<th>2021 Total</th>
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<tr>
<td><strong>Assets</strong></td>
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<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>Prepaid expenses</td>
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<td><strong>Total Assets</strong></td>
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<td>31,730,782</td>
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<td><strong>Liabilities and Net Assets</strong></td>
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<td>Accounts payable</td>
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<td>Discretionary</td>
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<td><strong>Total net assets</strong></td>
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<td><strong>Total liabilities and net assets</strong></td>
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<td>31,730,782</td>
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## Statement of Activities

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<th>2022</th>
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<tr>
<td><strong>Revenues and other support</strong></td>
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<td>Contributions</td>
<td>13,587,889</td>
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<td>Investment income</td>
<td>486,034</td>
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<td>Net realized and unrealized gains on investments</td>
<td>(6,018,444)</td>
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<td>Change in cash surrender value of life insurance</td>
<td>(229)</td>
<td>(542)</td>
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<tr>
<td>Other</td>
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<td><strong>Total revenues and other support</strong></td>
<td>8,055,293</td>
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| **Expenses:**         |            |            |
| Program services      | 1,352,113  | 1,273,490  |
| Management and general| 124,038    | 110,712    |
| **Total expenses**    | 1,476,151  | 1,384,202  |

| Increase (decrease) in net assets | 6,579,142 | 4,143,465 |

| **Net assets at beginning of year** | 31,677,241 | 27,533,776 |
| **Net assets at end of year**      | 38,256,383 | 31,677,241 |

Complete audited statements are available at the office of the Foundation.