

# Community Foundation

OF BURKE COUNTY



2005  
Annual Report

helping good people do great things



## **Board of Directors**

Sitting L-R: Hugh Fletcher, Mike Fulenwider, Cyndie Callaway, John Branstrom (President),  
Jim Lowdermilk (Treasurer) and Jim Rostan

Standing L-R: Le Erwin, Harold Mitchell, Chip Black, Sterling Collett, John Ervin (Secretary),  
Otto Woerner (Vice-President), Susan Wilson, Nettie McIntosh and Paul Deaton



The mission of the Community Foundation of Burke County is to encourage, develop and support local philanthropy through flexible charitable asset management for individuals, families and organizations to meet, in perpetuity, the changing needs of Burke County; and to grant significant charitable gifts and scholarships in this county.

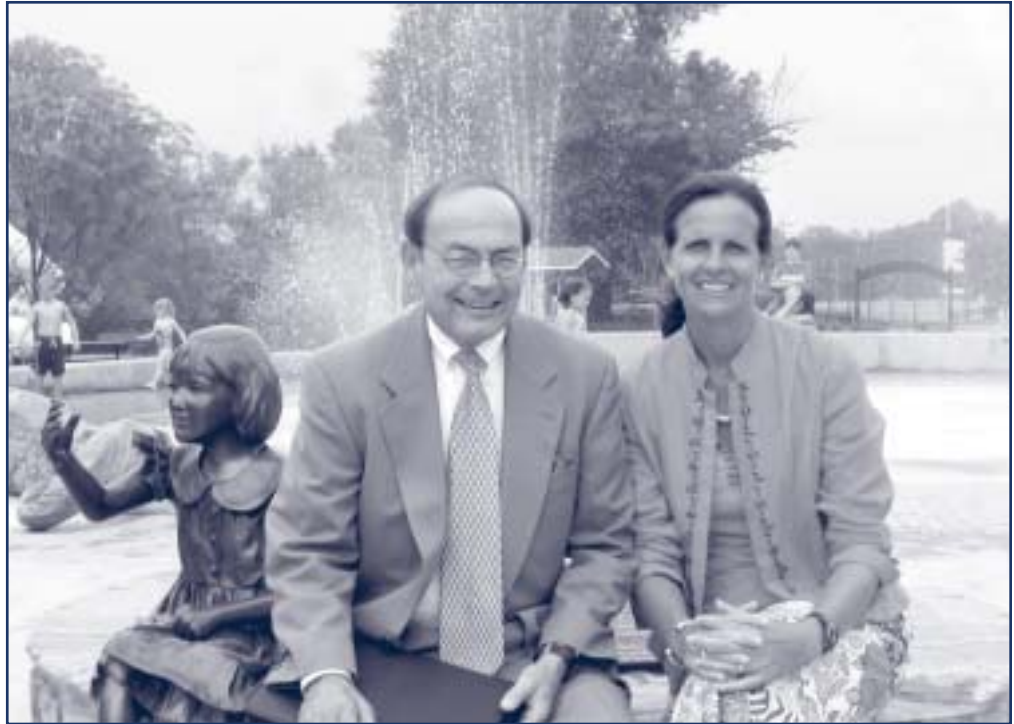
## Year in Review

**T**he Community Foundation of Burke County is an organization whose primary permanent concern is Burke County . . . its people and their interests, its communities and their efforts, its churches and nonprofits and their missions, its public institutions and their services, and the natural environment that supports us.

Calendar year 2005 was a time of great emergence for the Community Foundation. The community we serve is discovering us. We are becoming a philanthropic center for individuals and families interested in our skilled investing and grantmaking services. A growing number of churches and nonprofits recognize the benefits we offer. Donors committed to the betterment of their communities increasingly involve the public sector in our work.

This annual report for the year 2005 reflects this broad and growing impact. The “Grants in Action” section reflects the diversity of specific support being offered and also categorizes it into general areas of interest. Monies granted by the Community Foundation (a total of \$236,000) to these various interests almost doubled from the previous year.

In every way, the Community Foundation of Burke County is being invited to the table when the present needs and future dreams of Burke County are discussed. Our unique ability to use charitable dollars to help now and to also offer a source of long term funding support is an important reason. More importantly, people understand how the work of the Community Foundation is impacting the lives of the good people of Burke County.



A wonderful example of this is the funding received for the permanent up keep of Martha's Park, where the above photo was taken, the widely used and extremely popular children's park in Morganton.

None of this would happen without committed citizens who deeply care about our home and have stepped forward with hopeful attitudes about achieving and maintaining excellence in our way of life in Burke County. Please examine our lists of the volunteers who serve on our Board of Directors and on our advisory committees. Join us in a hearty thanks for a job well done.

We invite you to learn about us and to involve us. Your dreams and passions are our dreams and passions.

**John T. Branstrom**  
*President*

**Caroline M. Avery**  
*Executive Director*

# Unrestricted Grants & Scholarships

## Unrestricted Grants Cycle Awards

Once a year, the Grants Committee of the Community Foundation uses unrestricted funds to support vital programs serving our community. Local nonprofits are invited each May to request funding for valuable projects that are making Burke County a better place to live. The Grants Committee carefully reviews and researches applications, conducts site visits and recommends grants that the Board approves for the most critical programs serving this community each year.

CFBC Grants Committee Chair Dr. Paul Deaton and committee members Hugh Fletcher, Joy Hemstreet, John McElrath, Jean VanNoppen and Edna Weller recommended unrestricted grants in excess of \$42,000 for the 2005 Unrestricted Grants Cycle.

**Mimosa Christian Counseling Center** received a \$10,000 grant to be used to provide counseling for low income adults and children needing mental health counseling.

**Consumer Credit Counseling Services** received \$8,800 to partially fund a credit counselor to work with clients in Burke County.

**Repay's Genesis Project** received \$8,580 to help fund a case manager's position. This new program will provide a single point of reentry to Burke County for men and women being released from the North Carolina prison system.

**Foothills Service Project's Faith in Action Program** received \$6,000 to build handicapped ramps for this community's disabled individuals.



**Phoenix Group Homes** (*photo above*) received \$5,000 to help fund an executive director position to manage the administrative work of two group homes.

**Rock School Arts Foundation** received a \$2,870 unrestricted grant from the Emmanuel A. and Romilda P. Richard Endowment. This grant will be used to provide an art class for disadvantaged and/or minority students in the Valdese community.



**Conflict Resolution Center** (*photo above*) received \$1,620 to provide training, facilitation and support for their Student Council on Human Relations, which works in both local high schools to help prevent violence and conflict.

*CFBC salutes these fine organizations and extraordinary people, who are striving to improve the quality of life for all people in Burke County.*

## 2005 Scholarship Recipients

### Harry L. Hallyburton Scholarships

Jamie Deal (UNC – Chapel Hill)  
Ben Johnson (UNC – Chapel Hill)  
Lynnsey Stainback (UNC – Greensboro)

### Larry A. Huffman, Sr. Scholarship

Danielle Styles (Lenoir Rhyne College)

### Andrea Galen Jacks Scholarship

Labon Ray Ashley (Carson-Newman College)

### Faye T. Russell Scholarships

Ronnie Barrier (Appalachian State University)  
Tara Hubbard (UNC – Wilmington)

### Wynne and Otto Woerner Scholarships

Gregory Caldwell (North Carolina Central University)  
Jeremy Dale (Appalachian State University)

### Glenn R. Yoder Scholarship

Jamie Deal (UNC – Chapel Hill)  
Tara Hubbard (UNC – Wilmington)

### Clyde Nichols Young, Jr. Scholarship

Jeremy Dale (Appalachian State University)

# Financial Reports

Year Ended December 31, 2005

(With Comparative Totals for 2004)

## Statement of Financial Position

## Statement of Activities

<b>Assets</b>	<b>2005</b>	<b>2004</b>
Current assets:		
Cash and equivalents	\$ 653,241	\$ 493,751
Promises to give, current portion	7,799	23,570
Other receivables	399	78
Total current assets	661,439	517,399
Promises to give,		
less current portion	300	5,253
Investments	2,640,123	2,218,412
Property and equipment, net	11,565	14,243
<b>Total Assets</b>	<b>\$3,313,427</b>	<b>\$2,755,307</b>
<b>Liabilities and Net Assets</b>		
Current liabilities:		
Accrued expenses	\$ 486	\$ 4,670
Net assets:		
Unrestricted	504,740	482,533
Restricted:		
Temporarily restricted	2,778,201	2,248,104
Permanently restricted	30,000	20,000
Total restricted	2,808,201	2,268,104
Total net assets	3,312,941	2,750,637
<b>Total Liabilities and Net Assets</b>	<b>\$3,313,427</b>	<b>\$2,755,307</b>

<b>Revenues and Other Support</b>	<b>2005</b>	<b>2004</b>
Contributions	\$ 707,087	\$ 612,927
Investment income	94,749	69,850
Net realized and unrealized gains		
on investments	96,417	202,068
Loss on equipment disposition	(1,400)	(308)
In-kind contributions	11,312	11,312
Other income		500
<b>Total revenues and other support</b>	<b>908,165</b>	<b>896,349</b>
<b>Expenses</b>		
Program services	285,922	189,988
Management and general	49,939	43,955
Bad debt expense	10,000	
Total expenses	345,861	233,943
Increase in net assets	562,304	662,406
Net assets at beginning of year	2,750,637	2,088,231
<b>Net assets at end of year</b>	<b>\$3,312,941</b>	<b>\$2,750,637</b>

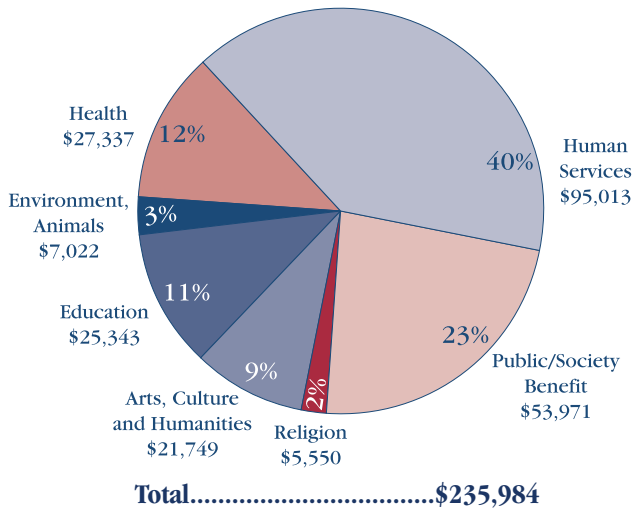
2005 Audit completed by Painter, Russell & Woodson, PLLC

Financials were extracted from the annual audit.

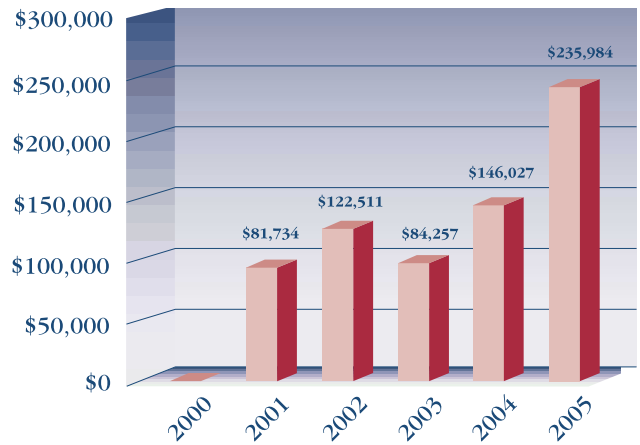
Complete audited statements are available at the offices of the Community Foundation.

# Grants in Action

## Grants by Area 2005



## Grants to the Community



## 2005 Grants in Action

Alzheimer's Association .....	1,375.72
American Cancer Society .....	1,375.72
American Red Cross .....	2,000.00
Appalachian Family Innovations.....	17,000.00
Barium Springs Home for Children .....	1,375.72
Blue Ridge Healthcare Foundation .....	100.00
Burke Arts Council .....	1,945.28
Burke Council on Alcoholism & Chemical Dependency .....	500.00
Burke County Endowment for the Arts.....	2,000.00
Burke County Friends for Animals .....	1,934.20
Burke County United Way .....	3,492.64
Burke Hospice & Palliative Care .....	4,409.48
Burke United Christian Ministries.....	23,870.76
Catawba River Baptist Association.....	400.00
Community Foundation of Burke County .....	4,812.12
Conflict Resolution Center .....	1,620.00
Consumer Credit Counseling Services.....	8,800.00
Disabled American Veterans .....	1,375.72
El Bethel Baptist Church.....	150.00
First Baptist Church-Morganton .....	2,110.08
Foothills Conservancy of N.C.....	1,717.14
Foothills Service Project .....	6,000.00
Good Samaritan Clinic .....	16,200.00
Grace Episcopal Church .....	4,400.00
Grandfather Home for Children .....	1,375.72
Habitat for Humanity of Burke County .....	28,018.36
Hickory Christian Academy.....	400.00
Historic Burke Foundation .....	6,303.28

Library Foundation of Burke County, Inc. ....	6,992.64
Mimosa Christian Counseling Center .....	10,000.00
Mountain View Cemetery .....	2,970.24
North Green Street Presbyterian Church .....	1,000.00
Options.....	3,096.40
Phoenix Group Homes, Inc. ....	6,000.00
Piedmont Council of Boy Scouts of America .....	250.00
Presbytery of Western North Carolina .....	500.00
Repay, Inc.....	8,580.00
Rock School Art Foundation .....	4,639.88
Rotary Club of Valdese.....	200.00
Scholarships .....	10,750.00
South Mountain Children's Home .....	6,375.72
Southeastern Children's Home, Inc.....	200.00
Spartanburg Children Shelter, Inc. ....	200.00
St. Andrew's School of Delaware, Inc.....	1,000.00
St. Jude's Children Research Hospital .....	1,375.72
The Meeting Place One, Inc.....	10,000.00
UNC-Chapel Hill School of Nursing Foundation.....	500.00
UNC-TV .....	4,500.00
Valdese Elementary School .....	2,870.76
Valdese First Christian Church .....	500.00
Waldensian Presbyterian Church .....	2,870.76
Waldensian Presbyterian Church Museum .....	250.00
Western Piedmont Community College.....	5,000.00
Western Piedmont Foundation .....	100.00
Windwood Farm Home for Children, Inc.....	200.00
<b>TOTAL.....</b>	<b>235,984.06</b>

## Tribute to a Benefactor

### Albert Mehl

by Bernice Q. Tuttle

Thousands of students who attended the North Carolina School for the Deaf (NCSD) for half a century (1945-2000) remember Albert Frederick Mehl (1917-2003).

Mr. Mehl made NCSD his home for many years. He was compared to being one in the school's family. Many have experienced shock to learn he was from another state. He was born in Pittsburgh, Pennsylvania. He graduated from the Western Pennsylvania School for the Deaf. He worked in Pittsburgh greenhouses for four years. His next job was in an aircraft factory in Akron, Ohio prior to coming to North Carolina.

He arrived in Morganton by train in 1945 with a small piece of luggage (now in NCSD museum). He was hired as a dormitory supervisor for older boys and later became a teacher for learning disabled children in the high school. In 1964, he became a Graphic Arts instructor and served in the position until his retirement in 1982.



Following his retirement he continued to remain active with the school as a substitute teacher, role model, volunteer and benefactor.

Mr. Mehl was loved and highly respected. Many credited him for his wise advice and guidance. Others claimed he was a wonderful role model. He helped many students to overcome barriers of all kinds. Many graduated with the "can do" attitude with their developed vocational skills.



He was also very much involved in adult Deaf Community organizations. He was a charter member of the Table Rock (Deaf and Hard of Hearing) AARP Chapter No. 5076. He had membership in the NSCD Alumni Association; the North Carolina Association of the Deaf; the National Fraternal Society of the Deaf; and the Deaf Seniors of America, Inc.

By 1990, Mr. Mehl became a resident of the Grace Ridge Retirement Community. He died on July 14, 2003 at the age of 86. His grave is on the campus at NCSD. His portrait hangs in the NCSD museum.

Upon his death and in memory of Mr. Mehl, family members established the Albert Mehl Endowment to support organizations benefiting his beloved Deaf Community in perpetuity. If you would like to make a gift to the Mehl Endowment or to create your own fund to honor a loved one, please contact Executive Director Caroline Avery at (828) 437-7105.

# Endowment Funds

*Please consider making a donation to one of these endowments.*

## **Blue Ridge Community Action Limited Endowment Fund**

supports programs that foster the development of economically depressed families and develops the human resources, which carry out community action programs.

**Board of Directors Administrative Fund** supports the programs and administrative expenses of the Community Foundation.

**Burke Arts Council Endowed Fund** supports programs and projects of the Burke Arts Council in Burke County, North Carolina.

**Burke County Friends for Animals Endowment Fund** creates a permanent source of income for the Friends for Animals.

**Burke County United Way Fund** is used to assess, on a continuing basis, the need for human service programs; to see solutions to human problems; to assist in the development of new or the expansion or modification of existing human service programs; to promote preventive activities, and foster cooperation among local, state, and national agencies serving the community.

**Burke Hospice & Palliative Care Endowment Fund** provides palliative and supportive care for terminally ill patients and their families, either directly or in consultation with the patient's physician or with a community agency.

**Burke Hospice & Palliative Care, Inc. Limited Endowed Donor Advised Fund** provides palliative and supportive care for terminally ill patients and their families, either directly or in consultation with the patient's physician or with a community agency.

**Children's School Scholarship Endowment Fund** provides scholarships to qualified applicants to the Children's School.

**Jackie and Paul Deaton Fund** has broad charitable purposes.

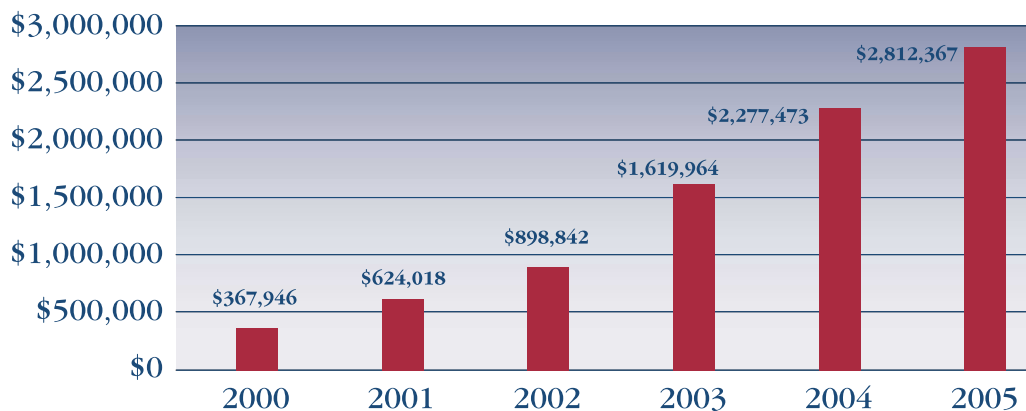
**Jimmy C. Draughn Scholarship Endowment Fund** provides scholarships to qualified applicants from eastern Burke County, North Carolina.

**Drexel Alumni Association Fund** provides scholarships to qualified applicants from the Drexel School area of Burke County, North Carolina.

**Mildred P. and J. Hugh Fletcher Endowment Fund** has broad charitable purposes.

**Foothills Conservancy of North Carolina Burke County Endowment Fund** supports Foothills Conservancy's operations and mission of land and water conservation in Burke County.

## **Growth of Total Endowment Funds**



# Endowment Funds

**Emily and Francis Grill Memorial Fund** supports the programs of the following nonprofit organizations: Alzheimer's Association, Hospice of Burke County, Inc., American Cancer Society, Grandfather Home for Children, South Mountain Children's Home, St. Jude Children's Research Hospital, Habitat for Humanity of Burke County, Inc., Barium Springs Home for Children, and Disabled American Veterans.



**Habitat for Humanity of Burke County Fund** (photo above) supports the Gospel of Jesus Christ by developing, building, renovating, rehabilitating and maintaining decent housing in Burke County for economically disadvantaged people and to help them create a better human habitat in which to live and work.

**Historic Burke Foundation-Alice Elaine Falls Endowed Fund** provides funding for the programs and projects of the Historic Burke Foundation.

**Historic Burke Foundation-Alice Elaine Falls Limited Endowed Donor Advised Fund** provides funding for the programs and projects of the Historic Burke Foundation.

**Larry A. Huffman, Sr. Scholarship Fund** provides scholarships to qualified applicants from eastern Burke County, North Carolina.

**Andrea Galen Jacks Scholarship Endowment Fund** provides scholarships to foster children in the area of Burke County, North Carolina.

**Joyce Amos Jones Endowment Fund** has broad charitable purposes.

**Jerald C. Liebhart, Sr. & Grace Folmar Liebhart Fund** provides funds for a travel fellowship outside or within the United States primarily for a member, between the ages of sixteen (16) and twenty-two (22), of First Baptist Church of Morganton, North Carolina.

**Library Foundation of Burke County Endowment Fund** supports the maintenance and programs of a free public library in Burke County.

**Martha's Park Endowment Fund** provides funding to preserve and maintain the park.

**Albert Mehl Endowment Fund** provides support and charitable services to the deaf and hearing impaired community in and around Burke County, North Carolina.

**Morgan-Avery Fund** has broad charitable purposes.

**Mountain View Cemetery Fund** is used for the charitable purposes of the Evangelical Methodist Church and the First Baptist Church of Connelly Springs, specifically the maintenance of the Mountain View Cemetery.

**Options Against Family Violence Fund** supports intervention services for victims of domestic violence, rape and sexual assault in Burke County.

**Ann Cornwell Patton & George Thomas Cornwell Fund** provides educational opportunities to persons who are economically disadvantaged including assistance to at risk preschool children. It also supports the administrative expenses of the Foundation for the first 10 years.

**Emanuel A. and Romilda P. Richard Endowment Fund** benefits Waldensian Presbyterian Church Service Committee, Burke United Christian Ministries Food Services Program, Valdese Elementary School (special needs for children) and Hospice of Burke County. Annually, a portion of the Fund will meet the changing needs of the Burke County community as determined by the Community Foundation.

*Endowment Funds continued . . .*

**Rock School Arts Foundation Endowment Fund**

helps to promote and encourage interest in the visual and performing arts through the Rock School Art Foundation.

**John P. Rostan, Jr. and Naomi Bounous Rostan**

**Endowment Fund** has broad charitable purposes.

**Stiff Endowment Fund** is established in memory of Dr.

A. Olin and Evelyn Senter Stiff to improve healthcare in Burke County with a current focus on nursing scholarships and the school nurse program.

**Valdese Rotary Club Endowed Scholarship Fund**

provides scholarships to qualified applicants from eastern Burke County, North Carolina.

**Waldensian Presbyterian Church Cemetery**

**Endowment Fund** provides funding for the maintenance of the cemetery.

**Waldensian Presbyterian Women Scholarship**

**Program Endowment Fund** provides scholarships to qualified applicants from Waldensian Presbyterian Church.

**Wynne and Otto Woerner Endowed Scholarship**

**Fund** has been established to help Burke County students further their education. One scholarship is specifically for direct descendants of Carolina Shoe employees and the other scholarship is available to anyone living in Burke County.

**Glenn R. Yoder Scholarship Endowment Fund**

provides scholarships to Burke County students with financial needs and whose character reflects a commitment to the objectives of Lion International.

**Clyde Nichols Young, Jr. Endowed Scholarship**

**Fund** provides scholarships to qualified applicants from Freedom High School.

## Advisory Committees

**Acceptance Committee**

John Ervin, Chair  
Harold Mitchell  
Phil Church

**Executive Committee**

John Branstrom, Chair  
Chip Black  
John Ervin  
Le Erwin  
Jim Rostan  
Otto Woerner

**Finance Committee**

Jim Lowdermilk, Chair  
Mike Ayotte  
Chip Black  
Mike Fulenwider

**Grants Committee**

Paul Deaton, Chair  
Hugh Fletcher  
Joy Hemstreet  
John McElrath  
Jean VanNoppen  
Edna Weller

**Investment Committee**

Sterling Collett, Chair  
John Branstrom  
John Rostan  
Otto Woerner

**Nominating Committee**

Chip Black, Chair  
John Branstrom  
John Ervin  
Jim Rostan  
Jack Weir  
Edna Weller

**Personnel Committee**

Jim Rostan, Chair  
Cyndie Callaway  
Harold Mitchell

**Scholarship Committee**

Le Erwin, Chair  
Cyndie Callaway  
Hugh Fletcher  
Tom Rogers  
Susan Wilson



## Staff

Toni Nadeau, *Financial Assistant*, (left) & Caroline Avery, *Executive Director*, (right)



Please visit our new website!  
[www.cfburkecounty.org](http://www.cfburkecounty.org)

**Community Foundation of Burke County**

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**for good • for ever**

