

PERSPECTIVE

THE COMMUNITY FOUNDATION OF BURKE COUNTY

WINTER 2008-2009

Message from the Executive Director



Dear Friends,

I have a poor memory, but I will not forget 2008. It has been a year that has challenged us as individuals, as a country and as a community.

Others might choose to make a gift to an existing endowment. Our nonprofits are hurting – they need gifts now but they also need to build their permanent funds to provide secure funding for their future needs. Review our list of endowments on the last page of this newsletter and make a donation to a favorite fund.

There is so much work to be done. The economy, the world and the needs of this community demand that we put aside our differences and work together to help our neighbors. There are many ways to help and participate.

As our economy struggles, so do our friends and neighbors in Burke County.

As our economy struggles, so do our friends and neighbors in Burke County. Many of us are tightening our belts and sacrificing in these uncertain times. As we try to accomplish more with less, please do not forget about those hurting in our community. Do not allow a weak stock market to dampen your spirit

The path taken by Connie and John Kos is but one example. Please read the beautiful article written by Rev. Tom Bland about this fine couple. Through a testamentary gift, they chose to establish an endowment that would address the changing needs of the Burke County community. Distributions from their fund will be used for our Community Grants, a cycle enabling the Kos' fund to meet the ever-changing needs of the Burke County community.

and keep you from best part of this season – helping those less fortunate.

There is not a better time to give – a poor economy means that your gifts are needed more than ever and will be used for the maximum good. Please remember that if we all do our part and focus on those causes that are most important to us, we may accomplish great things. Thank you for sharing your

Your Community Foundation awarded almost \$75,000 in 2008 Community Grants. This was a 60% increase from 2007! Read about our Community Grants recipients on pages 2-3. You might want to contribute to our Community Fund, a permanent fund that supports Community Grants, or make a donation towards our 2009 Community Grants.

Thank you for sharing your gifts and yourselves with us.

gifts and yourselves with us. I am thankful for you.

Caroline M. Avery
Executive Director

Investment Return

2007	5.6%
2006	13.1%
2005	7.3%
2004	15.5%
2003	25.3%

Please visit our website for 2007 financials, scholarship information and much more! www.cfburkecounty.org



Back L-R: R.L. Icard (Foothills Service League), Joy Ann Downing (Compassionate Hearts of Oak Ridge Baptist Church), Renee Lewis (Repay), Charlie Hillman (Meeting Place One), and Howard Williams (Frankie Foundation)

Second L-R: Linda Minich (Big Brothers Big Sisters), Tom Kenney (Foothills Conservancy of North Carolina), Jeannie Ownbey (Appalachian Family Innovations)

Front L-R: George Logan (New Day Christian Church & Strategic Community for Children), Marla Black (Habitat for Humanity), and Lew Edwards (American Red Cross)

Not Pictured: Angel Food Ministries of First United Methodist Church Valdese and Good Samaritan Clinic

\$74,000 in Community Grants

The Community Foundation's seventh Community Grants Cycle awarded \$74,000 to fourteen nonprofit organizations providing excellent services in the Burke County area.

CFBC's Board of Directors allocated \$30,000 of unrestricted funds to be used for the most effective projects addressing current needs in Burke County. Additional community grants were made from the Avery-Causby Endowment, Camp Lake James Endowment, Community Fund, Patton Cornwell

Endowment, Richard Endowment, Rostan Endowment and Taylor Endowment.

Chaired by Dr. Paul Deaton, the Grants Committee diligently researched existing needs in Burke County and programs that are meeting those needs. Detailed applications were reviewed and site visits were conducted by Grants Committee members Paul Deaton, Doris Fullwood, John McElrath, Marc Mitchell, Jean VanNoppen and Eddie Wall.



New Day Christian Church basketball camps

The Board of Directors approved grants to the following organizations and projects:

American Red Cross received \$3,200 to outfit an emergency response vehicle.

Angel Food Ministry of First United Methodist Church Valdese was awarded \$5,000 to purchase food products.

Appalachian Family Innovations received \$5,000 to support their home visitation program that transforms high risk, first time parents by teaching and reinforcing healthy parenting skills.



Foothills Service Project box truck

Foothills Service Project received \$8,000 for the purchase of a box truck to use with their thrift stores.

Frankie Foundation was awarded \$1,000 for the production of "The Legend of Frankie Silver".

Good Samaritan Clinic was granted \$5,000 for their medication assistance fund.

Habitat for Humanity of Burke County was awarded \$8,000 for the purchase of a truck to be used for the Habitat Restore.

Meeting Place One received \$7,500 for a life skills project to make residents (homeless men) more hirable and better able to retain jobs.

New Day Christian Church was granted \$6,000 to support their cooking and basketball camps, which help teach children important life skills.

Repay received \$4,400 for the production of a Drug Court educational video to be used in public presentations for fundraising and public awareness.

"These organizations are meeting many critical needs for our community," stated Community Foundation President John Ervin. "The Foundation is proud to help them improve the quality of life for all people in Burke County."



Appalachian Family Innovations' Catawba Valley Healthy Families Program

Big Brothers Big Sisters was granted \$4,152 to start a mentoring program for deaf children.

Burke County United Way and the Strategic Community for Children received \$10,000 to be used on a collaborative effort to research the establishment of a central force for coordinating, monitoring and advocating on behalf of all children in Burke County.

Compassionate Hearts of Oak Ridge Baptist Church was awarded \$1,500 for malpractice insurance for their newly established medical clinic serving eastern Burke County.

Foothills Conservancy of North Carolina was granted \$5,000 for conservation and recreation projects in Burke County.



Meeting Place One, home for homeless men

2007 Scholarship Recipients



Jimmy C. Draughn

Amber Bradshaw (WPCC)

Drexel Alumni Association – Mildred and Hugh Fletcher

Augustus Morrow (UNC - Wilmington)

Drexel Alumni Association – Harry L. Hallyburton

Jessica Buchanan (Wingate University)

Kristan Chavis (WPCC)

Aaron Dale (NC State University)

Ashley White (Lenoir Rhyne College)

Drexel Alumni Association – Faye T. Russell

Timothy Dula, II (UNC Greensboro)

Anna Epley (Lees McRae College)

Larry and Louise Huffman

Dustin Beck (Emory & Henry College)

Raymond K. Miller

Vue Yang (WPCC)

Stiff Endowment

Cadria Clymer (WCU)

Clarissa Crooks (WS State University)

April Feimster (Lees McRae College)

Valdese Rotary Club

Joseph Brookes (NC State University)

Shawn Chapman (WCU)

Elizabeth Hawes (WPCC)

Augustus Morrow (UNC - Wilmington)

Megan Smith (ASU)

Waldensian Presbyterian Women

Zacheus Daw (Guilford College)

Catherine Lafferty (UNC - Chapel Hill)

Whitney Lowman (UNC - Chapel Hill)

Christina Naylor (ASU)

Sarah Sanders (UNC - Asheville)



**Waldensian Presbyterian Women –
Michael Morse Scholarship**
Augustus Morrow (UNC - Wilmington)

**Waldensian Presbyterian Women –
Rostan Family Foundation Scholarship**
Hailey Garrou (Lenoir Rhyne College)

Wynne and Otto Woerner Scholarship
Selita Lowman (Caldwell Community College)
Shawn Chapman (WCU)

Glenn R. Yoder Scholarship
Tina Lor (UNC - Charlotte)

Clyde Nichols Young, Jr.
Andrew Foote (Georgia Institute of Technology)

Total: \$33,745.00

Number of Scholarships: 29

Charitable IRA Portfolio

Turning Retirement Accounts into Charitable Good

There is good news for community foundation donors in their 70s – and for the communities they care about. A new law makes it possible to give individual retirement account (IRA) assets to charity through 2009, free from federal tax. Formerly, all lifetime distributions from IRAs were taxed – even those given to charity.

This means that, now, our donors can give far more with less. This may be an attractive giving option for you if you are:

- Over 70. and now receiving minimum IRA distributions – but do not need the extra income.
- Interested in making a significant lifetime gift.

Through 2009, the new law allows those age 70 and older to transfer up to \$100,000 from an IRA to charity this year – and another \$100,000 next year – tax-free. If married, each spouse can transfer \$100,000 per year from his or her IRA. Using IRA assets to make a gift during your life, as opposed to giving via bequest in your will, enables you to experience the joy of making a major gift.

For more information on the charitable giving legislation and the Charitable IRA opportunity, please contact Caroline Avery at (828) 437-7105 or visit our website at www.cfburkecounty.org.

Example:

Mr. Smith, age 75, has accumulated approximately \$2,000,000 in his IRA accounts. He has other sources of wealth and has plans to leave a sizable estate to his heirs and charity.

Under the new law, Mr. Smith can create a fund at the community foundation to address the causes he cares about most by transferring IRA funds tax free. Mr. Smith can transfer up to \$100,000 in 2008 and another \$100,000 in 2009. In addition, if Mr. Smith is married, his wife can also make similar gifts from her IRA accounts.

Tribute to a Benefactor *Contributed by Tom Bland, Jr. – Senior Minister, First Baptist Church, Morganton*

Reflections on the Life and Work of John and Caroline “Connie” Kos

John and Connie Kos were both natives of Michigan – John from Grand Rapids, and Connie from the smaller community of Moddersville. Both grew up in hard-working families and in separate but closely related traditions of Dutch Protestantism.

As a young woman, Connie moved to Grand Rapids and ultimately took a job there in an airplane factory. She had not lived there long when she met John, who was the younger brother of Cornelius Kos, who had married one of Connie’s aunts. John had already begun his long career as a chemist with the Wolverine Corporation. John and Connie were married on September 9, 1939, beginning a union that would span over 67 years.

In the early 1950s, John and Connie moved for a year to Bogota, Colombia, where John continued to work at a Wolverine plant. Upon returning to Michigan, the ever adventurous couple contemplated a move to Alaska but decided instead to let Wolverine send them south to Burke County, NC. John continued his work as a chemist at Wolverine, which ultimately became BASE, located on Carbon City Road. Connie enjoyed homemaking, first on Hilltop Street and later on Pax Hill Road, where the couple relocated in the mid-1960s. Connie also became a regular volunteer at Broughton Hospital. Ever inventive, John is remembered by friends and neighbors for his distinctive heating system, hothouse, and other devices that he crafted at the Pax Hill home. He also became an active beekeeper. Friends, relatives, and neighbors recall the great pleasure that John and Connie took in many outdoor activities, including canoeing.



John Kos



Caroline “Connie” Kos

In April of 1962, John and Connie were baptized into the membership of the First Baptist Church of Morganton, where they remained faithful in attendance and in service as long as they were able. They both preferred roles of quiet but substantial service through the Lord’s Supper and Baptismal Committee, along with various positions in children’s and adult Sunday School ministry. Until very recent years, when health concerns became very serious, John and Connie were a fixture on one of the back pews at First Baptist, inspiring so many (including present pastor Tom Bland, Jr.) with their faithfulness and perseverance.

Just before Thanksgiving, John passed away suddenly on the evening of November 18, 2006. Despite many physical limitations, Connie continued to live in the home until just a few months before her death, on August 16, 2008.

John and Connie were the kind of people whom Jesus envisioned when He admonished His followers to be “salt and light.” In their very quiet but incredibly substantial way, John and Connie sought to make a difference in their adopted community through service especially to young children, to the physically and mentally infirm, and to people whom Jesus called “the least of these,” wherever they encountered them. While remaining very private in their activities here, John and Connie nonetheless touched a lot of lives in many wonderful ways. And through the Community Foundation of Burke County, their legacy of life-enhancing service will live on!



The mission of the Community Foundation of Burke County is 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.

New Endowment Funds Established

Endowment funds are established to safeguard finances to care for future generations. There is not a better method to care for your church, your favorite nonprofit or your community as a whole.

Every endowment is unique. The donor decides the purposes, the beneficiaries and the amount of flexibility of the fund. Five new endowments have been established with the Community Foundation.

Caldwell Arts Council Endowment, established by William White, Jr., and **Caldwell Arts Limited Endowment** will support the cultural arts in Caldwell County by encouraging participation in a variety of arts events, promoting the arts, by cultural planning for the community, and by offering various educational



opportunities and administrative services in support of artists, art agencies and audiences.

Christian Shull Children's Endowment is established for broad charitable purposes, but its primary focus is the needs of children in Burke County.

John L. and Caroline W. Kos Endowment is established to meet the ever-changing charitable needs of the Burke County community.

Lifegains Limited Endowment will support its charitable mission of operating as a foster care services agency and providing alternative family living services to mentally retarded and developmentally disabled adults.



Establish a fund and your legacy will live on ...

Year end giving leads to bright beginnings

Whether you are tackling year-end tax planning or preparing for a New Year's Resolution to accomplish your philanthropic and financial goals, the Community Foundation offers a charitable solution.

Community Foundation of Burke County

For more information, call (828) 437-7105 or visit us online at www.cfburkecounty.org

CFBC Endowment Funds

Please consider making a donation to one of these endowments.

Avery-Causby
 Blue Ridge Community Action
 Bowers-Greene
 Burke Arts Council
 Burke County Friends for Animals
 Burke County United Way
 Burke Education Endowment Program Ltd.
 Burke Hospice & Palliative Care
 Burke Hospice & Palliative Care Ltd.
Caldwell Arts Council*
Caldwell Arts Council Ltd.*
 Camp Lake James Stewardship Fund
 Charles M. and Alice M. Carey Endowment
 for the Humane Treatment of Animals
Christian Shull Children's*
 Community Fund
 Jackie and Paul Deaton
 Jimmy C. Draughn Scholarship
 Drexel Alumni Association
 Jean Conyers Ervin
 Mildred P. and J. Hugh Fletcher

Foothills Conservancy of North Carolina
 Good Samaritan Clinic
 Francis and Emily Grill
 Habitat for Humanity of Burke County
 Historic Burke Foundation-Alice Elaine Falls
 Historic Burke Foundation-Alice E. Falls Ltd.
 Larry and Louise Huffman Scholarship
 Andrea Galen Jacks Scholarship
 Joyce Amos Jones
John L. and Caroline W. Kos*
 Library Foundation of Burke County
 Jerald C. Liebhart, Sr. &
 Grace Folmar Liebhart
Lifegains Ltd.*
 Martha's Park
 Albert Mehl
 Raymond K. Miller Scholarship
 Morgan-Avery
 Morganton Day School Scholarship
 Mountain View Cemetery

Options Against Family Violence
 Ann Cornwell Patton &
 George Thomas Cornwell
 Quaker Meadows Cemetery
 Emanuel A. and Romilda P. Richard
 Rock School Arts Foundation
 John P. Rostan, Jr. & Naomi Bounous Rostan
 Rotary Club of Morganton Scholarship
 Salisbury-Taylor
 Stiff
 Stop Alcohol and Drug Addiction
 Donald and Betty Taylor
 Teeth in Need
 Valdese Rotary Club Scholarship
 Waldensian Presbyterian Church Cemetery
 Waldensian Presbyterian Women Scholarship
 Wynne and Otto Woerner Scholarship
 Glenn R. Yoder Scholarship
 Clyde Nichols Young, Jr. Scholarship
**New Endowment Fund*

Want to Learn More About the Community Foundation?

If you know a group that might enjoy learning about us, please contact Caroline Avery at 828-437-7105.

This short 15-20 minute presentation explains how the Foundation works and how anyone can become a philanthropist.

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