

NEW FUNDS THIS QUARTER

Please welcome the following funds, opened during the last quarter, to the Foundation.

GIVING CIRCLE FUNDS: A Divine Collective

SCHOLARSHIP FUNDS: William L. Wall Family Scholarship

DONOR-ADVISED FUNDS: Hartfield NC Fund, Sylvia Mills and Joanne Mills Garrett Charitable Fund, Davis and Caitlin Roach Fund, Emily Roach Fund, Melissa and Kevin Watt Family Fund

AGENCY FUNDS: Girls on the Run (GOTR) Carrie Gilmore Memorial Fund

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Cover & Page Four: Dr. Margareta Claesson, photographed in her home in Durham in October 2017. Photo credit: Meg Buckingham.

NOTABLE LEADERSHIP NEWS

We are thrilled to announce the following news from the Foundation:

Jessica Aylor has been promoted to Vice President of Community Engagement. In this role, she oversees programs and partnerships that improve the quality of life in the Triangle region, especially for marginalized residents, and has recently celebrated her tenth anniversary with the Foundation. Ken Baroff has been promoted to Vice President of Donor Development. In this role, he is focused on building the philanthropic assets that the Foundation manages to better serve our community.

Pat Nathan is the Foundation's newest Board Chair; she began this role in July. She takes over for Jim Stewart, who previously served from July 2015 to June 2017.

Libby Richards, Senior Community Engagement Officer, recently celebrated her tenth anniversary with the Foundation, and **Robin Barefoot**, General Counsel, recently celebrated her ninth anniversary with the Foundation.

Triangle Community Foundation inspires and mobilizes giving, leadership, and action. By working together with donors and nonprofits to address critical community needs, we envision a vibrant Triangle where everyone thrives.

In September, our Board of Directors approved a new Strategic Roadmap that will guide our work for the next five years. We chose the term "Roadmap" on purpose: while it's important that we have a clear path and a destination in mind, we also recognize that there may be detours, we may have to stop for fuel, and we may decide to take a back road to explore some new territory.

As we embark on this journey, we realize that some of our new ideas and activities are going to stretch us and take us out of our comfort zones. One idea, one value, one destination that we are particularly committed to is advancing equity in our organization, in our work with nonprofits, with donors, and with our community. "Equity" has become a bit of a buzzword these days, but really, when we think about our vision that everyone in our region thrives, it's a no-brainer, and it should be embedded in our DNA.

But living into that value sometimes means having uncomfortable conversations and pushing ourselves to really contemplate the actions, the history, and the stories that have created privilege for some and barriers for others. It's not going to be easy, and it's not going to be something that we can strive for alone.

We've seen unfortunate examples in our country and in our communities over the last several months where the ideas and actions of some are meant to suppress or take away from others. We recognize now more than ever how the impact of our work needs to be as much about having these tough conversations—with our donors, our nonprofit partners, our community—as it is about grantmaking.

Personally, this is hard stuff for me. Because we also value "community," and for me, that means making space for all voices, all ideas, all perspectives. But sometimes, we are going to have to use our voice to call out what we think is wrong. This is new territory for us, and I want to thank *you* for being on this journey, for sometimes being uncomfortable with us, and for having the conversations that will ultimately shape our community for the better.

PRESIDENT'S MESSAGE





FOUNDATION WELCOMES NEW STAFF & BOARD MEMBERS





Hiral Patel, Marketing & Communications Associate, manages digital media, focuses on storytelling, and assists with events; with the goal of better communicating the impact and value of the Foundation to our community. An NCSU Communications graduate, Hiral worked with Group3 Communications, the NC State Department of Foreign Languages and Literatures, and Rise Against Hunger.

Steven Pearson, Board Member, is the Manager of IBM Corporate Citizenship & Corporate Affairs for North Carolina, South Carolina, and West Virginia. He is an East Durham resident and has worked at IBM in various capacities for 14 years. He also serves as an Executive Leadership Coach for UNC's Kenan-Flagler Business School. He holds his B.S. in Business Administration from Northeastern University.

Timothy W. Trost, Board Member, is the Senior Vice President and Chief Financial Officer at Chimerix. He has 30 plus years of experience in the financial field and last served as Vice President and CFO at Argos Therapeutics, Inc. Tim began his professional career with PricewaterhouseCoopers LLP, and holds a B.S. in Accounting from the University of Illinois at Urbana-Champaign and is a Certified Public Accountant.



^ Margareta Claesson reflects on a story of her husband's family.

THE IMPORTANCE OF COMMUNITY

There's a certain richness in community, of being part of something that yields a sense of belonging. Where neighbors truly are neighbors who look out for each other. Or so thinks Dr. Margareta Claesson. She learned early on what community means, and it has shaped her life, her learning, and her giving.

Claesson, a Foundation fundholder since 2005, grew up in the suburbs of Stockholm, Sweden, and spent weeks every spring and fall between the ages of 10-18 in a children's hospital dealing with juvenile diabetes. She remembers the attention she received from the doctors and nurses while there.

"I often felt like I was totally trapped," she says. "The kindness and attention the doctors and nurses showed me made me feel that I was truly cared for." They often arranged for someone to take her on walks in the parks or on visits to a museum. Later in life after she had moved to the United States, she wished she could have told her caretakers how she appreciated their attention. Her attempts to reconnect were futile as they had passed on and the hospital no longer existed.

She saw a lesson in the amount of time she took to reach back to her care team, and realized that giving back is something one shouldn't wait to do. She and husband Dr. Knut Schmidt-Nielsen knew fellow Foundation fundholder and board member Mark Kuhn, who helped them see that giving back can leave you with a profound feeling of gratitude. But it can do something else too, it can be fun and very interesting.

Kuhn and his wife Cynthia introduced them to Triangle Community Foundation, where Claesson now advises the Schmidt-Nielsen and Claesson Family Fund. Claesson's husband passed away in early 2007, but she excitedly continues their tradition of giving to local, smaller causes. She targets education and organizations that "help to self-help," values that she and her husband both espoused. Claesson admits that she didn't know much about philanthropy to begin with, but she feels much more confident now. "I didn't understand it all, and that was okay," she said, "The Foundation has given me a terrific, basic education."

Claesson doesn't worry about what her philanthropic legacy will be. In fact, she says it doesn't even matter. "I've lived longer than anyone thought I would, because of my diabetes," she expresses. She is happy to be here still, being able to meet wonderful people, and learning through attending Foundation gatherings such as Triangle Donors Forums, where she hears directly from the nonprofits she wishes to support. It's important for her to see organizations collaborating and learning skills that will help them function better.

But beyond grants from the fund, she keeps in focus a vision of what community is. "In a community, everyone is responsible for figuring out how its citizens can best be a part," she says. "That's reciprocated by the community's members who then give back to make it better and stronger. It's the process of give-take that actually gives so much. And by being engaged, your own life gets much more enriched."

Claesson says that she owes part of her commitment to engagement and interest in giving back to her late husband, who was a physiologist



"In a community, everyone is responsible for figuring out how its citizens can best be a part," she says.

and always curious about how things work, and how nature and animals work. He even wrote a book about it, *The Camel's Nose: Memoirs of a Curious Scientist*. Claesson gained this same sense of curiosity (through osmosis, she says), and ties it back to community.

Her advice?

"Find what interests you the most, what makes your heart tick. Education and learning don't have to be formal - the things you hear and read and the people you meet are what help you live better. "Notice what surprises you," she goes on to say, "especially when meeting and learning from others. It's the surprises that feed back to curiosity. If we keep interest in the people around us, if we realize each individual's values and abilities, then we can help to promote those. If we realize we're a community that can help each other by sharing skills and being aware of common values, we can live better."

Good words for such a time as this. — Melchee Johnson, Senior Donor Services Officer

OUR JOURNEY

The Foundation's journey has led us to this moment. Our community needs us, and we are here to answer the call. We honor our legacy and the forward-thinking leaders who brought us here, and we will take that spirit with us into the future - of our organization and of the community. We are proud to preview for you our new mission, vision & values, and encourage you to look for the full Strategic Roadmap, detailing our entire journey, in your mailbox shortly.

Our Vision

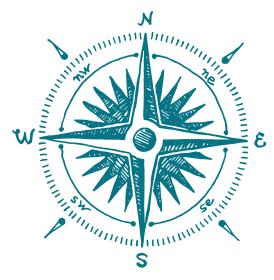
A vibrant Triangle that works together to ensure everyone thrives.

Our Mission

We inspire and mobilize giving, leadership, and action.

Our Values

Community. Equity. Leadership. Legacy.



WHAT MATTERS: OUR KIDS

The Foundation continues to focus on **Our Kids**, and ensuring that they have access to bright futures, so that they can thrive. Through **Our Focus**, we are dedicated to working with our partners through the Campaign for Grade-Level Reading (CGLR) to enhance youth literacy in our region. We believe that by investing in students at an early age, especially those who are the most marginalized, we can work together to ensure that all kids succeed.

COMING TOGETHER WITH AN EQUITY LENS

Triangle Community Foundation and other local funders have provided a joint grant to support equity training for NC Partnership for Children and the NC Pathways to Grade-Level Reading initative.

It is amazing what can happen when diverse stakeholders come together with a singular purpose of change. The power of zeroing in on the most critical years in a young person's life and bringing together families, experts, and state and community leaders to support that birth through age eight period can not only change individual children's lives, but can build communities across our state that contribute to a thriving North Carolina.

That is what is happening with NC Pathways to Grade-Level Reading. Pathways is an initiative with a bold vision – all North Carolina children, regardless of race, ethnicity or socioeconomic status, are reading on grade-level by the end of third grade, so that they have the greatest opportunity for life success. The North Carolina Partnership for Children is a key partner in the Pathways initiative led by the North Carolina Early Childhood Foundation.

Over the next several months, Pathways is hosting Design Teams to accelerate collaboration and craft a shared statewide course of action to have all children reading on grade-level by the end of third grade. A critical component to fostering this whole child planning approach is supporting the use of an equity lens. Each Design Team is engaging in training to develop a common language and an understanding of implicit bias, equity and structural racism, and is receiving coaching to develop strategies that address disparities in achievement. By ensuring that every conversation is had with an intentional focus on equity and inclusion, we will create powerful structural strategies for a statewide approach that supports the success of each child. And when we all come together with this kind of focus and dedication, we will make a difference for every North Carolina community. — Guest written by Donna White, North Carolina Partnership for Children

TO LEARN MORE VISIT WWW.TRIANGLECF.ORG/OUR-FOCUS/YOUTH-LITERACY OR WWW.SMARTSTART.ORG



^ Sterling Freeman and Kathleen Clark of OpenSource Leadership facilitate the group's first equity training. Photo courtesy of Donna White.



BUILDING STRONG LEADERSHIP, LEADING TO MORE CHILDREN FED

TABLE, a nonprofit that feeds local children, recently participated in Board Leadership Boot Camp, a six-week course provided in partnership by Executive Service Corps., Triangle Community Foundation, Blue Cross and Blue Shield of NC Foundation, and Youth Forward. As a Foundation, our goal is to build a strong and innovative ecosystem of nonprofits that can address the big challenges facing our region. Through capacity building programs, investing in equitable outcomes, and serving collaboratively as a platform for nonprofit needs, we are increasing the efficiency and effectiveness of our local organizations.

Approximately thirty percent of children in Carrboro and Chapel Hill rely on school lunch programs for meals. Without the help of organizations like TABLE, these children can't count on meals outside of school. For a decade, TABLE, a vital nonprofit organization in Chapel Hill-Carrboro, has been on a journey, working to feed local, hungry children. Initially serving only 12 children, TABLE has grown to feeding over 500 kids in preschool, elementary school, and middle school. Rapid growth brought growing pains to both the organization and the Board.

TABLE's Board of Directors was working hard to keep up with the demand faced by the organization. Quarterly meetings left little time to go over comprehensive issues, such as strategic planning and evaluation. Limited board efficiency threatened the impact of the organization.

The Board knew something needed to change. When Executive Director, Ashton Tippins, told Debbie McDermott, Board Chair, about an opportunity provided by Executive Service Corps (ESC), McDermott knew the Board Leadership Boot Camp opportunity couldn't be missed.

"I was faced with the challenge of improving the efficiency of the Board. I hoped the significant investment of time would be worth it, and it was," said McDermott.

The ESC Board Leadership Boot Camp program is an ongoing offering that serves as a primer for board of director best practices. Organizations send two board members to six sessions covering topics from board structure to sustainability. "Participants walk away with a better sense of roles and responsibility," said Trudy Smith, ESC Executive Director. "We want to help them focus on their mission and impact, so they can be stronger leaders, and get them excited at the same time!"

Board Leadership Boot Camp came at just the right time for TABLE. As TABLE was outgrowing their old location and working to raise awareness about themselves in the community, the Board was not organized in a way to respond to these new challenges. Participation in the program gave them access to ESC's team of professional consultants who guided them through a new and exciting transition, and established a new governance strategy.

"We could see the Board members engaging more. They gained motivation and brought that back to the organization, leaving everyone enthused and empowered," said Tippins.

Board Leadership Boot Camp helped TABLE to hold their first-ever Board retreat. Facilitated by members of ESC, Board members not only learned about their own strengths and weaknesses but began implementing best practices to create a stronger Board and stronger organization. *This story continues online.* — Hiral Patel, Marketing & Communications Associate



Jack Clayton recently retired as Regional President of Wells Fargo, after 40 years with the bank. Wells Fargo has been the presenting sponsor of the Foundation's What Matters Community Luncheon since 2010.

In September 2017, he was presented with the AE Finley Distinguished Service Award by the Raleigh Chamber of Commerce at their Annual Meeting. He has also been personally recognized by the NC Land Trusts as Corporate Conservation Partner of the Year, and by the Triangle Business Journal as CEO of the Year in his role at Wells Fargo.

Jack is an active fundholder and has worn many hats for the Foundation, including Board member and community volunteer, and he has served in the same capacity for many other Triangle nonprofits.

^ Will, Mary, Jack, John, Katie & Zach Clayton; photo courtesy of Jack Clayton

What are you passionate about? What issue(s) speak to you?

There's more than one, but right off the bat, I would say youth leadership. I've been involved with Boy Scouts for a long time – in Durham where I became an Eagle Scout and in Raleigh where I was an Assistant Scout Master and President of the Occoneechee Council and later on with all three of my sons who became Eagle Scouts. The organization does a great job developing leadership skills and confidence in young boys – teaching them how to survive in the woods, and in today's world.

I'm also really passionate about land conservation. I'm on the Triangle Land Conservancy board, and I really enjoy that. A few years ago, with a partner, my family purchased a 260-acre farm on the Cape Fear River, across from Raven Rock State Park. We are working actively on developing the land and planting long leaf pine trees on the property. We've just built a pavilion there and it is our hope that community groups can use it for a getaway place. We are also looking at conservation easements on it, developing it into a working tree farm, and using it as a place where our families can also enjoy the outdoors.

Tell us more about WHY you give back.

Well, part of it is a tithe – we have been given many things, and so we in turn give to help others. Whether it's through environmental nonprofits or scholarships, it is our responsibility to help others. We recently established a scholarship at Wake Forest University in honor of my Dad. At 92 years old, what more could he need or want? Now in his honor we are helping others attend Wake Forest, and isn't that great?

Our kids are also giving back. Our son Will founded and directs the Broughton Travel Fellowship to send our brightest, financially-in-need students from around the country on summer adventures around the world. These are students who would never dream of something like this. The goal is to create a space to dream and instill a notion of global citizenship, all while providing a compelling college admissions story. For us, it's all about helping others achieve their goals.

What excites you about the future of the Triangle? What worries you?

What excites me is all the incredible things going on that make this a wonderful place to live. I'm really energized about the future potential of Dix Park and the greenway system. Dix Park will be our Central Park! We love to walk, run and bike, and since we are close to the greenway we are able to access it easily. It's such a wonderful addition to Raleigh. There are so many things to do in the Triangle that make it a really attractive place to live.

What worries me is that with all this growth, I wonder if we can continue to keep the quality of life at the level we all want it to be. *This story is continued online.* — Meg Buckingham, Director of Marketing & Communications

TO READ MORE VISIT WWW.TRIANGLECF.ORG/COMMUNITY-RESOURCES/OUR-STORIES

OUARTERLY INVESTMENT OVERVIEW

As hurricanes tragically struck Texas, Florida and Puerto Rico, markets appeared unfazed and there was continued momentum in equities during the 3rd quarter 2017. The International Monetary Fund raised its global growth forecasts to 3.6% for both 2017 and 2018, pointing to signs of fundamental economic strength in nearly all regions. The US large-cap equities (S&P500) gained 4.5% for the quarter, Non-US equities (MSCI EAFE) gained 5.4%, and emerging (MSCI EM) equities gained 7.9%.

US gains continues to be the main focus as the markets experienced a fifth consecutive quarter of earnings growth, after seven previous consecutive quarters with negative earnings growth. Wage growth and inflation also remained steady for the time being.

International economies have been growing at an accelerated pace in recent quarters, as European Union industrial production hit its highest level in the past six years and unemployment is at its lowest level since 2009. In Japan, Prime Minister Shinzo Abe's party won majority control of the country's lower Parliament, increasing his chances of re-election next fall. Japan's economy has now expanded for seven straight quarters.

China reported quarterly GDP growth of 6.9%, but risks continue to build in terms of corporate and personal debt levels that have helped fuel the stronger equity and real estate markets. Importantly, China accounts for more than half of the global demand for iron ore, copper, zinc and tin, and their growth has a significant impact on many emerging market countries that depend on exporting such commodities.

For information pertaining to specific portfolio returns ending September 2017, please refer to the Investment Performance Report located on our website at: www.trianglecf.org.

For any additional inquiries, please contact Robert Naylor, Chief Financial Officer, at Robert@trianglecf.org or 919-474-8370 x4009.



IMPORTANT REMINDER!

Below are some important dates to remember when giving back this time of year. As always, we are grateful for your support of our community.

To secure a 2017 charitable deduction for a gift *into* a fund, please observe the following deadlines:

observe the following acadimes.	
Checks	Dated and Postmarked on or before December 30
Cash	Received by wire or delivery on or before December 29
Publicly-traded Stock	Received in our Schwab account on or before December 29
Mutual Funds & Restricted Stock	Initiated on or before December 8 or sooner if needed to close gift transaction
Real Estate & Business Interests	Initiated on or before November 1 or sooner if needed to close gift transaction

To ensure grants are made *from* a fund by December 31, we must receive your grant recommendations by 12 pm Tuesday, December 5.

Visit our website at www.trianglecf.org to recommend a grant.

Contact the Donor Services line at 919.474.8363 for

assistance.

A VIBRANT LEARNING COMMUNITY

Our fundholders are eager to learn more, get involved, and engage in dialogue about our region's future. Over the summer, we reached out to you and asked what you want to learn about and how you want to learn. And we are excited to now put your great ideas into action! We believe that by fostering a vibrant learning community within and outside the Foundation, we can share insight and ideas with each other, and ultimately have a greater impact in our community, together.

To that end, we've been working to expand our offerings for donor education, engagement opportunities, and information sharing in ways that you have requested.

This fall, we kicked off our first Grants in Action Tours in Chatham County, featuring a collaboration of nonprofits and Chatham County Public Schools working on the Campaign for Grade-Level Reading in those counties. Triangle Community Foundation has invested in multi-year funding, with the help of many donors, in this good work through Our Focus on Youth Literacy. Fundholders heard from several community leaders about the challenges facing Our Kids - who they are, what they need, and how this collaboration is working with families across the county. We look forward to featuring Wake, Durham, and Orange after the New Year and hope you will join us.

In early November, we continued our Triangle Donors Forum series, and added an "un-site" visit element, where fundholders and our Community Development grantees were able to interact, sharing vital data and information on poverty in the region, as well as discussing the individual impact of our nonprofit partners. This event launched our current **Giving Together: Community Development**, a collective giving program that you can be a part of - visit our website to learn more.

And in October, we rolled out our very first e-newsletter just for Donor Advised Fundholders, brought to you by our Donor Services team. This quarterly e-newsletter will share information just for you - and bring you new ways to connect with us. We look forward to rolling out a variety of community trend reports, donor education, and peer group opportunities in 2018 so stay tuned!

We hope that you'll continue to share your voice with us, so that we can all learn and work together to make this a vibrant Triangle for *everyone* to thrive. — Jessica Aylor, Vice President of Community Engagement

TO READ MORE VISIT WWW.TRIANGLECF.ORG/DONORS/GIVING-TOGETHER



SHOULD I USE DONORCENTRAL? I'M STILL ON THE FENCE...

DonorCentral is the Foundation's convenient and secure online service for donors who serve as advisors to funds. And so many of our fundholders use it! Still hesitant to try it out? Unsure how it would benefit you?

On DonorCentral:

- · You can submit grant recommendations and administer funds with the click of a button at any time of day or night
- You can view and print detailed financial data, including grant history and gift history, updated daily without worrying whether your staff liason is at their desk to answer questions
- You can read about collective giving opportunities and receive timely news about Triangle Community Foundation programs, ensuring you don't miss out on something important happening in the region or at the national level
- · You can take advantage of its new features and capabilities, offering an easier, more streamlined process for everyone

We are grateful to be a partner to our donors who are working with us to create a vibrant Triangle where everyone thrives. If you're ready to learn more about DonorCentral, we'd be happy to talk you through it! Please call us to schedule an orientation at 919.474.8363 or email us at donorservices@trianglecf.org.



^ Volunteers during clean-up efforts after Hurricane Katrina in Louisiana. Shulman volunteered with her fellow classmates from the New College of Florida in 2006. Photo courtesy of FEMA.

Our staff are a valuable resource. Their voices are important, they offer expert insight into our focus area and regional issues, and their unique perspectives are what drive the passion of the Foundation. So we've decided to share them.

On our new blog, you'll hear a variety of perspectives from our staff and Board members. These are the leaders that are going to move our community forward and guide us on our journey. We thank you in advance for sometimes speaking your mind through discomfort with us, and for having the conversations that will ultimately shape our community for the better. We hope you'll follow along online, and enjoy the story below!

A "BOTH/AND" APPROACH

This hurricane season, we have witnessed unprecedented natural disasters and the humanitarian crises that follow these events. At Triangle Community Foundation, moments after we've arrived in the morning, our fund holders are calling to make grant recommendations to the affected communities. Each time a massive hurricane wreaked havoc on a community, this happened. As part of the Donor Services team, I am humbled by the overwhelming generosity and consistency of our donors in times like these.

Twelve years ago, Hurricane Katrina ravaged the southeast. As a Floridian who is intimately familiar with the damage a hurricane can impart, I eagerly joined a caravan from my college to aid in grassroots disaster relief in the lower Ninth Ward of New Orleans. I spent a week in a hazmat suit, gutting houses so that residents could eventually move back home and begin to put their lives back together. I will never forget seeing overturned cars in trees and puddles of bright green chemical sludge in street gutters headed to the sewer. But alongside that wreckage were communities of people, local and not local, coming together to rebuild a neighborhood. That week (and the following spring break, when I returned to volunteer again) made an everlasting impression on me. The strength of coming together to help each other in a time of need cannot be overemphasized. Communities facing disaster - and especially the local nonprofits in those areas - need immediate resources to hasten recovery efforts. In the days following a natural disaster, it is the nonprofit "social first responders" who help residents meet their needs and direct external sources flocking to help the priorities for their community.

With a baby at home this year, I will not be going to the Caribbean to participate in relief efforts, however I have donated to a relief organization on the ground. And so have our fund holders. As of October 27, our donors had put forward \$119,000 in disaster relief funding for Hurricanes Harvey, Irma, and Maria. This funding supported different organizations, including the Houston Community Foundation, the Miami Foundation, Hispanics in Philanthropy and the Red Cross.

The type of responsive philanthropy I have recently witnessed at the Foundation is a "both/and" approach. Funding both local causes (73% of our grants stay in the Triangle) and national calls to action in times of crisis, donors at the Foundation are responding to both basic national needs and long-term community "thrivival" (if you will).

In a world where zip codes are the strongest determining factor in life success, spending outside of your region in times of crisis is incredibly important to ensure that we are creating a more equitable world. I applaud our fund holders who have stepped up and fueled the recovery efforts. — Laurel Shulman, Donor Services Associate

TO READ MORE STORIES LIKE THIS FROM OUR STAFF, VISIT OUR MEDIUM BLOG AT WWW.MEDIUM.COM/@TRIANGLECF



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What Matters: Women