

# What Matters

MAKE A DIFFERENCE | QUARTERLY UPDATE | FALL 2016

## IN THIS ISSUE

- 2 President's Letter
- 2 You're Invited to our Housewarming!
- 3 Reminder! End-of-Year Giving Dates
- 4 #equitymatters
- 4 Investment Overview
- 5 No Easy, Quick Answers in Equity Work
- 6 Save the Date! What Matters: Our Kids
- 7 Innovation: Changing the Odds

## NEW FUNDS THIS QUARTER

Please welcome these new funds to the Foundation.

**Donor-Advised Funds** Sheila and Bob Breitweiser Family Fund, 8/30; THTJB Fund, 8/11; Joe and Tamara Rice Fund, 8/11

**Agency Funds** Manbites Dog Theater Fund, 10/2

Contact Ken Baroff, Director of Donor Development at 919.474.8370, ext. 4001 to learn how you can partner with the Foundation to make a greater impact.

## The Push to Merge

Written by Meg Buckingham, Director of Marketing & Communications

The M word. Often suggested by funders recognizing the abundance of nonprofit organizations doing similar work in a community, and equally feared by nonprofit leaders doing that work. Over the last few years, mergers have become a hot topic in the philanthropic world, bringing both their negative connotation of failure, as well as their assumption of ease and necessity.



Should all like nonprofits merge? It's often not that simple to decide, according to Erin Suwattana and Genevieve R. Megginson, of Child Care Networks and Chatham County Partnership for Children. The two organizations officially merged in 2016, after a lengthy process that ensured the stability of their missions and their clients in the community.

"We were lucky to have the right mix of situation and people. That didn't make a merger easy, it just made it possible," said Suwattana. "You can't just take two nonprofits and put them together. It has to make sense on so many levels, to the boards and the staff, and you have to be doing it for the right reasons, for your clients."

For Child Care Networks, the motivation to merge was born out of major events, some stemming from a place of crisis. The long-term executive director retired in 2012, leaving room for change within the organization. In 2013, the nonprofit lost a major contract with the Department of Social Services that provided child care subsidy, leaving the organization scrambling to make up a third of its revenue. In 2014, one of the programs provided by Child Care Networks was in a serious deficit, and even though they were able to fundraise to meet the needs of their clients, the board was weary and looking for ways to secure the stability of the services they provided to a very large population.

"At that time, after we had struggled through these events, we started looking at creative ways to move forward," said Suwattana. "We had a close relationship with Chatham County Partnership for Children already, and our missions were very closely aligned. This allowed us to approach their board to explore a merger."

At the end of the year in 2014, the organizations applied for a Youth Literacy assessment grant through Triangle Community Foundation's Capacity Building Partnership program, and they were awarded the funding to complete an assessment in 2015. Their goal? To determine whether a merger or shared services was something that could work, and be

continued on page 6

Connect with us!



A NOTE  
FROM THE FOUNDATION  
PRESIDENT & CEO

LORI O'KEEFE



initiatives. We are really proud of this program, and you should be too. Stay tuned as we continue to roll them out over the course of the next year.

I encourage you to save the date for What Matters: Our Kids on April 26, 2017 where we will welcome Sonia Manzano (of Sesame Street fame). We plan to discuss the opportunity gap that our children face before they even reach kindergarten and what we can do, together, to close it. I'm excited for this conversation, and I hope you will be too.

Please make sure to update our addresses:

**New Mailing Address:** PO Box 12729, Durham, NC 27709

**New Physical Address:** 800 Park Offices Dr, Suite 201, Research Triangle Park, NC 27709

Happy Holidays to you and your families!

Partnering to make a difference...

This has been a season of change at the Foundation. Over the last few months, we have cleaned, purged, and packed our belongings and moved to a new office! Thanks to the generosity of our donors, we are really excited to now offer a community-driven, accessible space for our local nonprofits to utilize for meetings and events. We are also happy to be back in the heart of the Triangle, and to be working in such a bright and cheery environment. We hope you will come to visit once we are unpacked, and attend our housewarming party (invitation below). We can't wait to show you around!

A special note for fundholders - we know that the end of the year is a busy season for you too. I encourage you to review the important reminders about end-of-year giving on page 3 of this update. These dates are set so that we can ensure that grantmaking is done in accordance with your wishes, so please keep them in mind. And feel free to contact our Donor Services team if you have any questions or need any assistance - that's what they are here for!

I want to specifically thank all of our fundholders who co-invested in Giving Together: Community Development this fall. Because of your generosity, we were able to make additional grants to 10 of our

past partners, who are working to make a difference in housing, health and employment

ONCE WE'RE FINALLY UNPACKED...

## LET'S HAVE A PARTY!

### YOU'RE INVITED

TO OUR FOUNDATION HOUSEWARMING PARTY

**Thursday**

**February 2, 2017  
4:30 PM - 7:00 PM**

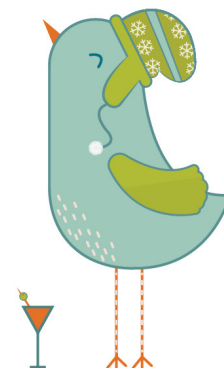
*Join us for an open house as we celebrate our new space. Drinks and appetizers will be served.*

**800 Park Offices Dr., Suite 201,  
Research Triangle Park, NC 27709**

DON'T FORGET TO

## RSVP

by **January 19, 2017** at  
[www.tcfhousewarming.  
eventbrite.com](http://www.tcfhousewarming.eventbrite.com)



## Please join us in remembering these friends...

**Arlene M. Bergman** - Arlene passed away on July 28, 2016. Arlene and her husband were owners of the Record Bar, one of the largest national retail record store chains, and also grew the Bare Essentials stores into a household name. She was a member of the NC Child Advocacy Institute, a Board Member of Arts & Lectures at University of California Santa Barbara and a Board member of the Child Abuse Listening Mediation in Santa Barbara.

**Martha Howerton** - Martha passed away on January 25, 2016. She taught music at Meredith College and was the church organist at First Baptist Church in both Raleigh and Southern Pines. She volunteered as a candy striper, and she was a strong supporter of the Durham Rescue Mission and Senior PharmAssist.

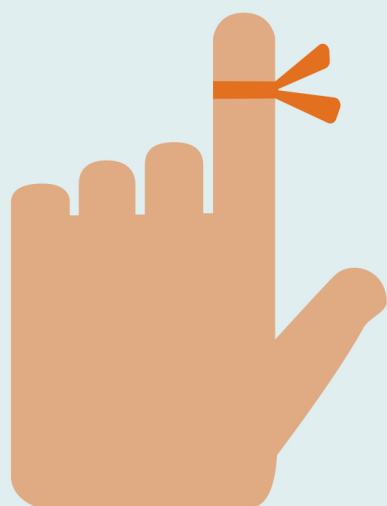
**Rep. Paul Luebke** - Paul passed away on October 28, 2016. He served in the state House of Representatives for the past 25 years, representing part of Durham. He was a strong and consistent liberal voice on policy issues including the death penalty, education, gay marriage, abortion and programs to help the poor. His full-time job was as a professor of sociology at UNC Greensboro. He wrote two books about the history and practice of North Carolina politics as of 1990 and updated for 2000.

**J. Horst Meyer** - Horst passed away on August 14, 2016. He was a Swiss scientist doing research in condensed matter physics, who taught at Duke University since the 1950's. In 1993 he received the Fritz London Memorial Prize and in 1982 the Jesse Beams Award of the American Physical Society. In 2014 he was awarded the "University Medal" of Duke University.

**Col. Donald Williams, ASAF** - Donald passed away on July 13, 2016. When he was barely 20 years old, he flew 37 B-17 combat missions over Europe with the 388th Bomb Group of the 8th Air Force. During his service, he was awarded the Silver Star, the Distinguished Flying Cross, the Purple Heart, and the Legion of Merit. Throughout his life, he worked with organizations such as Carol Woods, IFC, the Ewing Foundation, ACCESS, Strowd Roses, and Hospice.

**Clara T. Yager** - Clara passed away on July 17, 2016. She was dedicated to her family - her two children, ten grandchildren, and 21 great-grandchildren.

If you have an obituary you would like to share with us, please contact Caleb Baker at [caleb@trianglecf.org](mailto:caleb@trianglecf.org).



## 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 2016 charitable deduction for a gift *into* a fund, please observe the following deadlines:**

Checks	Dated and Postmarked on or before <b>December 31</b>
Cash	Received by wire or delivery on or before <b>December 30</b>
Publicly-traded Stock	Received in our Schwab account on or before <b>December 30</b>
Mutual Funds & Restricted Stock	Initiated on or before <b>December 9</b> or sooner if needed to close gift transaction
Real Estate & Business Interests	Initiated on or before <b>November 1</b> 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 6.**

Visit our website at [www.trianglecf.org](http://www.trianglecf.org) to recommend a grant.

Contact the Donor Services line at 919.474.8363 for assistance.



## #equitymatters

In 2016, the Foundation embarked on a journey, working closely with Gita Gulati-Partee and OpenSource Leadership Strategies, to explore how we can do more to help create a more equitable community through philanthropy. We have dedicated this space in our quarterly update to share what we are learning, what we are thinking about, and what questions we still have. We believe transparency is important, so check back here each quarter and let us hear from you as we learn more together about the importance of #equity.

Our board and staff have been reviewing our recently completed equity assessment, coming up with suggestions for how we can focus more on equitable outcomes in our programs and policies. In October, we held Part one of a workshop for donors and local funders to dig into the differences between equity and equality, consider structures in our society, and discuss what we can do to make change, specifically in Our Focus (arts, community development, environment and youth literacy). We encourage you to read about this workshop in the story on page 5.

### It's now been six months since What Matters 2016: A Region of Opportunity, and we want to ask you - what are you doing?

- What have you or your organization done?
- How has this inspired you?
- What would you like to do?
- What resources do you need to do it?

We'd really like to hear what you think. Please send us an email, at [meg@trianglecf.org](mailto:meg@trianglecf.org), and let's report back as a community next quarter!



## Investment Overview

For the first six months of this year, the equity markets languished as investors questioned how much more the Federal Reserve could do to stimulate the economy. Then in late June 2016, investors were caught off guard as the UK voted to leave the European Union. In the 3rd quarter 2016, markets experienced positive results around the globe, spurred on by positive economic data in both the US and China. The Federal Reserve held off on raising rates this year, but investors are keenly aware of improved economic conditions and growing inflation (CPI currently at 1.1%) which may prompt the monetary authority to consider another rate hike soon.

The S&P500 (US large cap equities) gained 3.9% for the quarter, while Non-US Equities (MSCI EAFE) gained 6.4% and Emerging Equities (MSCI EAFE) gained 9.0% for the quarter. For information pertaining to specific portfolio returns ending September 30, 2016, please refer to the Investment Performance Report located on our website at: [www.trianglecf.org](http://www.trianglecf.org).

---

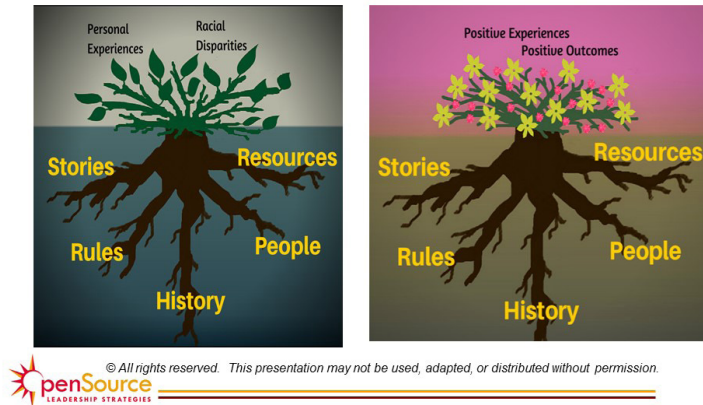
For more information, please contact Robert Naylor, Chief Financial Officer, at [robert@trianglecf.org](mailto:robert@trianglecf.org) or 919.474.8370, ext. 4009

# No Easy, Quick Answers in Equity Work

Written by Meg Buckingham, Director of Marketing & Communications

Structural inequity is like a weed...

Equity transforms it into a flower...



Equity work isn't about finding absolute answers to anything. It is about asking questions over and over and over again and making good decisions about how to address particular problems in particular areas through an equity lens. That's according to Gita Gulati-Partee, Founder of OpenSource Leadership Strategies, who led over 60 fundholders and community leaders through a discussion at the Foundation's October Donor's Forum.

The Forum continued the theme of equity after last year's Donor's Forum that brought John Quinterno of South by North Strategies and David Dodson of MDC to discuss mobility and access to resources, and the 2016 What Matters Community Luncheon: A Region of Opportunity where Dr. Tony Iton of the California Endowment spoke about birthplace and identity as an indicator of health outcomes. In an effort to dig a little deeper, the Foundation brought leaders in all four of Our Focus areas to lead table discussions with donors that were specific to their interests.

Gulati-Partee kicked off the Forum with food for thought, leading with a definition of equity (an equitable society would be one in which there are improved outcomes for all and the distribution of resources, opportunities and burdens is not determined, predictable, or disproportionate by identity or zip code) and highlighting the difference between equality, inclusion, diversity, and equity as well as sharing with the group her vision of inequity as a weed in our society.

"Structural inequity is like a weed, appearing above ground as negative personal experiences and disparities across identity groups. The goal is to transform it into a flower, equity, of positive experiences and positive outcomes," she said. "But to do that, we have to first dig out the root structure that holds inequity in place, and transform it to help structural equity take root and grow in our communities, in our giving, and in our work."

With Laura Benson of Durham's Partnership for Children and William Jackson of Village of Wisdom leading education tables, John Parker of the Duke Endowment leading the community development table, Justin Robinson of Conservation Trust for NC and Hawley Truax of Z. Smith Reynolds Foundation leading the environment table, and Deb Royals-Mizerk of Justice Theatre Project leading the Arts table, participants self-selected and jumped right into discussion with those questions in mind.

After 30 minutes of discussion, the group was candid in their observations of how challenging even entering the discussion of equity in the program areas, and in their own giving, is.

"This is really hard work, and it takes a lot of forethought and introspection. Each and every decision I make, each and every organization I look at; it's important to be intentional in how I approach my giving," said Michelle Serrano-Mills, Foundation fundholder with Next Generation of African American Philanthropists (NGAAP). "I'm going to have to be engaged, I have to learn, and I have to ask questions, in order to feel like my giving is a part of the solution. That's challenging, but worth it."

Jackson, who led one of the education tables, spoke about the interesting discussion in his group surrounding equity in our nonprofits, and approaching the issues from that direction.

"I think this discussion we had here about the skills that nonprofits have that are providing services, regarding what their responsibility is to be culturally responsive to the families and people they are working with was really significant," he said. "For organizations that say they work with low-income families and communities of color, are they centering this conversation in the work they do, and is it responsible for them to do that if they aren't?"

Fundholder Eileen Welch, also of the Durham Colored Library pointed out the significance of the story structure that everyone brings to an equity discussion, and how important it is to think of that before diving into this work.

*This story continues online at <http://trianglecf.org/community-resources/our-stories>. This Forum, Equity and Prosperity: Growing Together, Not Apart was Part 1 of 2 that will be held during the 2016-2017 season. Triangle Donor's Forum is an educational series that convenes our fundholders with grantmakers and leaders from other regional foundations to learn more about pressing community issues.*

Story continued from page 1

sustainable for these two organizations.

“We thought the concept of shared services was interesting but it did not offer the promise of stability and cost savings that we were looking for to sustain and grow. We realized through the assessment process that we could save money by merging and eliminating duplicative administrative positions and that that would give us the support we needed to potentially grow our services, the ultimate goal after all is said and done,” said Megginson of the decision to merge.

So the organizations moved forward. They applied for additional capacity support from the Foundation and were granted funding to being merger negotiations. These negotiations took place over three months, and included the two directors and four board members (two from each organization) to dig into issues including logos, benefits, supervisory roles, board makeup, mission, pay rates, organizational cultures, and more.

“We did not agree easily on all these issues,” said Suwattana. “I wouldn’t want anyone to think otherwise. But we had two executive directors and boards that respected each other, and were strong in their passion for their missions, and ultimately that allowed us to come to a place of real compromise.”

“We were driven by a strong sense that we could be much better together and that became our mantra throughout the process,” said Megginson. “It was hard at times and required very strong commitment from the get go.”

In October of 2015, the two boards agreed to the merger, and approved it as of the first of the year. Child Care Networks became a part of Chatham County Partnership for Children, and the two staffs combined to offer services to clients under a unified mission. But that doesn’t mean it was all seamless.

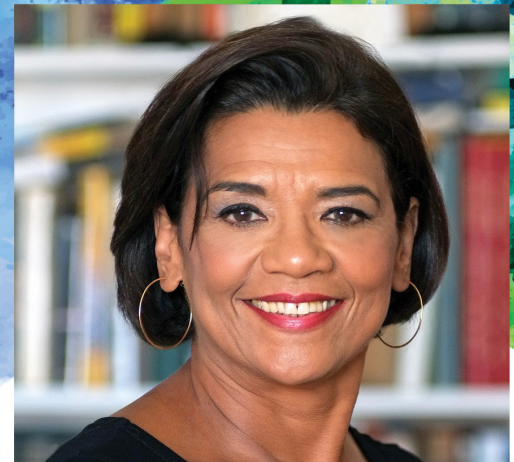
*This story is continued online at <http://trianglecf.org/community-resources/our-stories>. The Foundation believes in the importance of building strong nonprofits in our community, and funds merger explorations in addition to other capacity building assistance through Our Focus in the arts, community development and youth literacy.*

# SAVE THE DATE

RALEIGH CONVENTION CENTER | WEDNESDAY, APRIL 26, 2017 | 11:30 AM

## WHAT MATTERS: OUR KIDS

The Triangle is home to almost 100,000 children under the age of eight. Each child is born with the potential to succeed, but significant opportunity gaps develop before kindergarten even starts. These are our kids. What can we do to shift the path from poverty to prosperity so each one of our kids can thrive? How can we work together to accelerate change in the Triangle? Join us and let’s ensure our kids have access to their bright future.



For over 30 years, **Sonia Manzano** inspired, educated, and delighted children and families as “Maria” on Sesame Street. Throughout her career she has contributed to enriching diversity on television, on the stage, and in the educational realm. A first generation America of Latin descent, author and actress, Manzano’s tale is one of perseverance and courage.

**What  
Matters**  
TRIANGLE COMMUNITY  
FOUNDATION



# Innovation: Changing the Odds

Article written for the Foundation by Jenni Ciesielski, The Daily Tarheel



Innovation Award.

It's hard to move forward when you feel like the odds are stacked against you. This is a feeling teenagers aging out of the foster care system know all too well.

They face growing up — finding housing, education and jobs — without the family support others their age can rely on. There are social services available, but taking advantage of them requires days spent traveling from center to center, missing work and spending their wages on bus fares.

But in the Triangle, those social services have come together to create a hub of sorts. The Fostering Youth Opportunities collaborative will soon have a physical space thanks to a \$25,000 grant through the What Matters

"This collaborative creates a sense of family for these young people who have never experienced that before," said Rachel Aiken, Nonprofit Service Associate for the Triangle Community Foundation. "By having these agencies all in one place, it feels like they have someone in their corner fighting for them."

Wake Technical Community College, Durham's Life Skills Foundation, Orange County's Partnership to End Homeless and the Hope Center at Pullen in Raleigh are all partner agencies in this collaborative effort.

Rashidah Myrie, Executive Director of the Hope Center at Pullen, works to establish a support network for the young people who come to the Center. She gets to help them see beyond their circumstance to who they are capable of becoming as they receive the tools and support they need to succeed.

"The resilience that I've seen with this population is just amazing," she said. "They can have so many things happen to them, and yet they still find a way to rise above that and become productive members of society. Providing a safe space free from judgment is always a top priority."

"The journey to independence is different for each person who comes in. Some teens are initially open to help while others are more understandably reluctant," Myrie said. "They often are not willing to be as open with people just because of some of the things they've experienced, and so not being judgmental and meeting them where they are is key."

Fostering Youth Opportunities applied for the Foundation's Innovation Award in late 2015. The \$25,000 grant rewards collaboration and experimental approaches to solve problems, and build stronger nonprofits in the Triangle region.

Fostering Youth Opportunities pitched the idea of a one-stop-shop in which young people can meet with representatives from each agency to discuss needs and develop solutions. This approach not only increases efficiency for the individual being served, but also the agencies who are able to streamline and share resources.

Aiken said of the common mission, "This network of agencies is effective because no matter the issue, the focus always comes back to what is best for the young person."

*This story is continued online at <http://trianglecf.org/community-resources/our-stories>. The application process for the Foundation's 2017 Innovation Award has closed, stay tuned for an announcement of our finalists in December, and be at What Matters on April 26th to see this year's winner accept their award!*



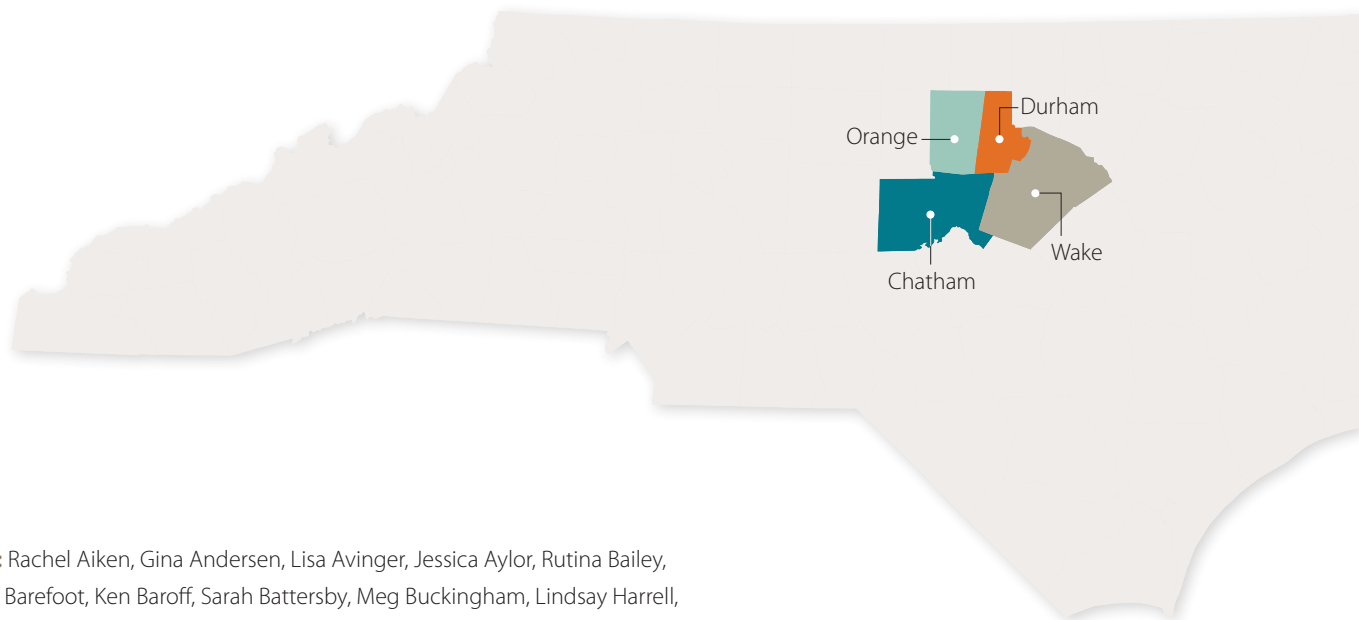
PO Box 12729

Durham, NC 27709

phone 919.474.8370 fax 919.941.9208

donor services 919.474.8363

**Triangle Community Foundation** enhances the lives of all residents in the Triangle region of North Carolina by connecting donors with causes they care about, providing funding for nonprofits and serving as a resource for local issues. Each year the Foundation grants more than \$22 million, partnering with donors and nonprofits to make a difference, now and for the future.



**Foundation Staff:** Rachel Aiken, Gina Andersen, Lisa Avinger, Jessica Aylor, Rutina Bailey, Caleb Baker, Robin Barefoot, Ken Baroff, Sarah Battersby, Meg Buckingham, Lindsay Harrell, Melchee Johnson, Robert Naylor, Lori O'Keefe, Jovon Packard, Libby Richards, Fran Wescott, Anne Wolf