

Competitive Grant Funds,
Kirby Endowment Funds
and
Donor Information



The Polk County Community Foundation, Inc.

2010

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Kirby Endowment Fund

at the

Polk County Community Foundation

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Section I: The Polk County Community Foundation, Inc.

The Polk County Community Foundation is a nonprofit organization dedicated to advancing philanthropy and improving the quality of life for all citizens in the community centered in and around Polk County.

The Community Foundation makes grants to area nonprofits, gives scholarships to local students, holds endowment funds for nonprofits, establishes funds to accomplish the charitable dreams of individual donors, and maintains a nonprofit resource library. The Foundation has served our community since 1975. It now has assets exceeding \$32,000,000, four paid staff members and over 50 volunteers to administer its 180 component funds. In the years 2007 – 2009, gifts exceeded \$7,000,000. Grants and scholarships totaling over \$1,000,000 are distributed annually.

Donors and local nonprofits established the funds and set the criteria for distributing grants from the funds. Some funds require a competitive application process and others pay grants automatically to certain nonprofits.

Planned gifts such as charitable remainder trusts and bequests are easily arranged at the Foundation.

Donations come from our community and grants are distributed to our community.

For more information about grants, scholarships or designing your own charitable giving program, please call 828-859-5314, email foundation@polkccf.org, visit the website www.polkccf.org or stop by 255 South Trade Street in Tryon, NC. Our hours are Monday – Thursday 9 – 4 and Friday 9 – 12.

Section II: Kirby Endowment Fund Grant Beneficiaries and their Funds

Mr. & Mrs. Davis G. Kirby and Katherine Kirby started making contributions to the Polk County Community Foundation in 1998 to create what has become the Kirby Endowment Fund. Before Dave's death in 2002, he preferred to remain anonymous so he named this group of funds the Tryon Area Endowment Fund.

The Kirby Endowment Fund is comprised of 27 different endowment funds, each with its own criteria for distribution. This booklet is one of the many charitable ideas of the Kirby Family and has its own fund to support its publication. The Kirby family named many specific organizations to benefit from their charitable giving in perpetuity and created some other funds which may be used by any organization to accomplish the specified purposes of the funds. All of the funds are described in this booklet.

Dave and Adie Kirby moved to Tryon from Winnetka, Illinois in 1976. They were both active in the community and were invited to join the Second Wind Hall of Fame in 1981. Dave and Adie's three daughters chose the following quote from a seventeen year old Dave to remember their father, "I would like to do the world some good, be helpful to it not so that my name can live, but so that I can die peacefully."

Katherine Kirby enjoyed living in Tryon for many decades before moving to Needham, Massachusetts. She was an honored member of the Tryon Garden Club and was invited to join the Second Wind Hall of Fame in 1987. Her home in New England had many reminders of her favorite places, people and organizations in Polk County. Katherine honored her mother, also a former Tryon resident, by creating a park bearing her name, Greene Corner, and donating it to our community. Katherine passed away in 2008 at the age of 98.

A. This section of the booklet describes grant payment procedures and fund criteria for the following organizations that receive special non-competitive Kirby Endowment Fund grants:

American Field Service – Polk County Chapter
Congregational Church of Tryon
FENCE
Hospice of the Carolina Foothills
Lanier Library
Polk County Community Foundation
Polk County Rescue Squad
St Luke's Hospital
St Luke's Hospital Auxiliary
Tryon Concert Association
Tryon Fine Arts Center
Tryon Garden Club
Tryon Little Theater

Deadlines for submission of the Kirby Grant Request Form for 2010:
January 26, March 23, May 18, September 7

American Field Service – Polk County Chapter: Host Family Fund \$2,100*
This grant is to be used in support of Polk County area AFS host families in offering their guests cultural experiences, family trips and living conditions that enhance attainment of the AFS mission.

American Field Service – Polk County Chapter: Scholarship for Study Abroad Fund \$2,600*
This grant is to help one or more well- qualified local students to participate in the AFS experience of studying abroad preferably for a year.



Congregational Church of Tryon: Innovative Events Fund \$1,300*
This grant is to be used toward the sponsorship of one or more innovative events for the edification and enjoyment of the congregation.



FENCE: Enjoyment of Nature Events Fund \$3,400*
This grant is to be used in the sponsorship of innovative events involving family, youth and community activities, especially oriented toward the enjoyment of nature and appreciation of the out-of-doors.

FENCE: Free Family Outings Fund \$4,200*
This grant is to be used in support of one or more free family outings, possibly one in the spring and one in the fall. It is intended that they have a wide community appeal featuring, as appropriate, family picnics, entertainment, music, games and the like. Once a pattern has been successfully established these free family outings may be continued as featured annual events.

FENCE: Hiking Trail Maintenance Fund \$1,000*
This grant is to be matched by FENCE operating funds and used exclusively for the maintenance of the walking and nature trails within the FENCE properties. Its purpose is to insure that the trails are maintained in line with specifications approved by the FENCE Board, are inspected monthly, and that signage is well maintained, and trail maps are updated and readily available to all concerned.

FENCE: The Log Cabin and Garden Maintenance Fund \$2,400*
This grant is to insure that the 'log cabin' is inspected regularly, is appropriately furnished, that the building and gardens are attractive and well maintained. Should anything happen to the log cabin, these funds should be used toward a similar activities center at FENCE.

**This amount does not include amount carried forward from 2009, if any.*

FENCE: Operating Expense Fund **\$40,000***

The objective of this grant is to strengthen FENCE's incentive for debt-free operations. Thus, the annual distribution from this fund is to be made only in those years in which FENCE is completely debt free as of the beginning of its fiscal year, except for such short-term debts, as are normally incurred in day to day business operations, and except for such long term debts as are covered by legally binding pledges from financially competent individuals and organizations. Such pledges are to specify the amount and the dates on which payments are to be made through to the complete retirement of the debt, covering both the principal and the interest incurred by the debt. Funds that are not distributable in any one year may not be held over for future use, but are to be added to the endowment fund to enhance its future growth.

FENCE: Summer Nature Programs for Youth Fund **\$3,800***

This grant is to be used in support of summer nature programs at FENCE for the youth of the area.



Hospice of the Carolina Foothills: The Jean Eckert Reserve Fund **\$3,800***

This endowment has as its objective the annual provision of funds to help the Hospice Executive Director take advantage of unplanned, unbudgeted opportunities to make the "end of life" as acceptable and pleasant as possible for all concerned.



Lanier Library: Innovative Events Fund **\$3,600***

This grant is to be used in the sponsorship of innovative events, such as book reviews and other activities oriented toward the enjoyment of the Library and its facilities.



Polk County Community Foundation: Directory of Kirby Endowment Fund Annual Awards and Grants Fund **\$1,300***

The income of this fund is to be used under the direction of the chair of the Polk County Community Foundation's Restricted Grants Committee early each year for the annual updating, publication, and distribution of an information folder describing the various awards and grants, their policies and procedures, which are available through endowments at the Polk County Community Foundation.

Polk County Community Foundation: Kirby Back to School Scholarship for Adults Fund **\$4,300***

This grant is to be used to assist one or more adults, 22 years of age or older, who seek to improve their professional, trade, or work skills. Financial need and dedication to worthy fields of endeavor are prime requisites for the award. This is a competitive scholarship which is awarded by the Community Foundation. Scholarship applications are available at the Community Foundation.

**This amount does not include amount carried forward from 2009, if any.*

Polk County Community Foundation: Kirby Civic Events Fund **\$2,000**
This grant is to be awarded by the Community Foundation to one or more community organizations in support of enjoyable civic events in the Tryon area. These civic events must be free to the public. Applications for these funds are available at the Community Foundation. Please refer to the application for additional grant criteria.

Polk County Community Foundation: Kirby Handbook Listing Polk County Area Scholarship Funds **\$2,700***
This grant is to be used under the direction of the chair of the Polk County Community Foundation's scholarship committee for the annual updating and publication of a handbook listing educational awards and scholarships originating in the Polk County and Landrum areas for high school graduates, and for others seeking higher vocational levels of employment. .

Polk County Community Foundation: Kirby Harmon Field Youth Activities Fund **\$4,000**
This grant is to be used in support of sports and recreational activities oriented toward the development of teamwork and good citizenship among the youth in the area. The events must be free to the public. Materials and minor capital improvements may be part of the fund request, if they are part of the activity. Applications for these funds are available at the Community Foundation. Please refer to the application for additional grant criteria.

Polk County Community Foundation: Kirby Rogers Park Innovative Events Fund **\$7,000**
This grant is to be used in support of entertaining, educational, and innovative events at the Gibbs Amphitheater at Rogers Park. The events must be free to the public unless donations or admissions charges are used to help pay for the event and all revenues collected in excess of expenses are returned to the Rogers Park Fund. Applications for these funds are available at the Community Foundation. Please refer to the application for additional grant criteria

Polk County Community Foundation: Kirby Scholarship for First Year Students Fund **\$3,900***
This grant is to be given to a local scholar of top academic standing on the basis of need to help cover the cost of the freshman year at a leading liberal arts college or university. This is a competitive scholarship which is awarded by the Community Foundation. Scholarship applications are available at the Community Foundation.



Polk County Rescue Squad: Operating Fund **\$1,200***
This grant is to be used in defraying operating and equipment costs.



**This amount does not include amount carried forward from 2009, if any.*

St Luke's Hospital: Patient Enjoyment Fund **\$1,200***
This grant is to be used in support of materials and programs for the enjoyment and edification of the hospital's patients.

St Luke's Hospital Auxiliary: Katherine Kirby Nursing Scholarship Fund **\$2,500***
This grant is to be used to fund one or more scholarships for individuals with demonstrated financial need who are seeking a degree in nursing. A scholarship recipient who has attained a "B" (3.0) average or higher may apply for additional one-year scholarships.



Tryon Concert Association: Program Enhancement Fund **\$6,100***
This grant is to be used to enhance the Association's annual selection and presentation of programs.



Tryon Fine Arts Center: Greene Corner Maintenance Fund **\$2,500***
This grant is to be used to enhance the Tryon Town maintenance of the Greene Corner, Melrose Avenue, so that at all times it is in excellent condition for civic use as well as for special programs.

Tryon Fine Arts Center: Innovative Events Fund **\$6,200***
This grant is to be used in the support of innovative events, particularly those involving community activities such as family entertainment, music, art festivals, and the like.



Tryon Garden Club: Pearson's Falls Trail Maintenance Fund **\$4,000***
This grant is to be used by the Tryon Garden Club for the maintenance, support and continued development of the Pearson's Falls trail system. The objective of the gift is to help the Garden Club provide easy, informative and enjoyable access to the common, as well as uncommon, wonders of nature, which exist in the area.

Tryon Garden Club: Special Projects Fund **\$3,900***
This grant is to be used at the discretion of the Garden Club, with no less than half the funds dedicated to beautification projects in Tryon's downtown area.



Tryon Little Theater: Annual Summer Youth Theater Program Fund **\$1,700***
This grant is to be used in support of the Annual Summer Theater program. This annual Summer play has been a tradition in the Polk County area for decades. Sometimes, it has been called the "Tryon Youth Center Play". It has been produced by the Tryon Little Theater for many years. The purpose of this fund is to insure in so far as possible, annual performances and timely planning and production activities.

**This amount does not include amount carried forward from 2009, if any.*

B. Procedures for Processing Kirby Endowment Fund Awards and Grants to Organizations Designated by the Kirby Family

Notification

Each year by December 31, the Community Foundation sends appropriate information and application materials to each of the named organizations, along with a statement of the amount of grant funds available to them in the year ahead. Starting in 2010, several examples of how grants are requested, approved and paid shall be included in this information package. The procedures for the Kirby Endowment Fund grants were specified by the Kirby Family and differ from other Polk County Community Foundation procedures for grant awards.

Application and Approval

Before grant funds may be released, they must be applied for and their proposed use receive the Community Foundation's approval that the proposed use is in line with the grant provisions. Grant applications for available funds may be submitted at any time during the year; however, the applications are reviewed shortly after the deadlines.

Deadlines for Review

2010 Deadlines: January 26, March 23, May 18, September 7. Please allow several weeks after the deadline to receive your organization's check, a notice that further review is required or a notice that the proposed expenditures do not fit the required criteria or procedures.

If the request is submitted past the deadline, the request shall be considered in the next round provided it arrives before the last deadline of the year. These deadline dates are timed to coordinate with committee and board meetings. Many grant requests shall be processed within four weeks; however, some requests may require additional processing time.

Evaluation

Each organization whose application for a fund grant has been approved, and has received the funding and has completed its project must submit a Final Project Report to the Community Foundation. In the absence of such a report, the Community Foundation is required to withhold action on future applications. Though a project's financial results are a matter of interest, the amount of the grant will not be affected as long as the conditions of the grants have been met.

Limitations

The unused portions of a grant may be held over for one additional year, subject to the Community Foundation's prior approval. Organizations that have not submitted an application by December 1 for the use of or for the hold over of their grant, will lose access to those funds. Such funds will be added back to the endowment fund reserve from which all grants to beneficiary organizations are made.

Section III: Competitive Grant Funds

The Polk County Community Foundation administers many competitive grant funds. Each has its own application. These competitive grants are awarded by volunteer committees at the Community Foundation in accordance with the criteria for each fund set by the donors of the funds. The guidelines in this booklet are general; specific criteria are listed in the grant applications.

Applications and deadlines are posted on our website (www.polkccf.org). For additional information concerning applications, deadlines, or eligibility, please contact the Grant Manager at the Polk County Community Foundation.

The Dr. William R. Bosien Fund

\$11,000

The Dr. William R. Bosien Fund at the Polk County Community Foundation was established in 1981 to honor the life and work of Dr. Bosien who gave twenty-five years of dedicated service to this area. The late Dr. Bosien moved to this area in 1954 with his wife Dr. Marian Bosien. Throughout his career as a general surgeon at St. Luke's Hospital, he touched many people's lives, making his name an honored household word throughout Polk County and its environs. Dr. Bosien recognized the need for continuing medical education for the nurses and other medical support professionals at St. Luke's Hospital. He cared for patients regardless of income and regularly treated patients who were unable to pay. To honor his ideals, over seventy-five families and individuals contributed to this fund.

Which organizations may apply? Continuing medical education funding (grant areas 1 and 2 below) is limited to St. Luke's Hospital and "Community Health Care Centers." (Community Health Care Centers are based in Polk County, primarily serve patients who live in Polk County, and are dedicated to serving patients who are unable to afford regular medical care. The Saluda Medical Center is an example of an eligible Community Health Care Center.)

All Polk County nonprofit organizations and units of government are eligible to apply for funding to enhance the availability of medical care for patients unable to afford care and for funding to provide medical educational programs for the general public (grant areas 3 and 4 below).

What types of grants may be awarded?

1. Continuing Medical Education Events in Polk County. Grants may be awarded to support local continuing medical education events for St. Luke's Hospital staff and the staff of Community Health Care Centers when the need for further education is identified.
2. Continuing Medical Education Events for Local Medical Staff. Grants may be awarded to allow St. Luke's Hospital staff and the staff of Community Health Care Centers to attend national and regional continuing medical educational events on

patient care with the understanding that information gained will be shared with other staff members and, when appropriate, with community healthcare workers.

3. Projects to Enhance the Availability of Medical Care for Those in the Community Who Otherwise Could Not Afford That Care. For example, grants may be awarded for local studies or programs which are meant ultimately to increase access to medical care for local people who are unable to afford regular medical care.
4. Sponsorship of Programs by Recognized Authorities to Educate the General Public on Healthcare Subjects. As an example, the Bosien Fund provided a grant for a free nutrition program by Jane Brody, a nationally known authority on nutrition, at the Tryon Fine Arts Center.

What type of grants won't be funded? Funds are not intended to be used for scholarships, for hospital capital expenditures, hospital equipment, or fundraising events. Medical care means managing disease or physical and mental impairments with surgery, drugs, exercise or diet. All events must occur after the grant award notification date. Grants must fit the criteria of the Bosien Fund.



Paul Culberson Agricultural Development Fund

\$4,000

The Paul Culberson Agricultural Development Fund was established at the Polk County Community Foundation in 1991 to recognize Paul Culberson for his outstanding contributions to all areas of our community. An initial anonymous gift by a member of our community started the fund and many donors have contributed to it over the years. Paul Culberson retired in 1977 as County Extension Chair, after 31 years with the extension service. Paul served our community in many ways over the years: he was the Executive Director of the Polk County Community Foundation for 20 years, a founder and director of the Foothills Equestrian and Nature Center, founder of the NC 4-H & Youth Foundation, President of Tryon Rotary Club, State President of the NC Agricultural Agents Association, Deacon and Trustee of the Congregational Church of Christ, and President of Tryon Country Club. The initial donor specified, "It is intended to serve as a perpetual tribute to Paul Culberson for the innumerable services that he has given to the community over the years; and, hopefully, for many years to come."

The Paul Culberson Agricultural Development Fund at the Polk County Community Foundation gives grants for the advancement of agriculture in our community and related purposes.



Elementary Seeds for Education Fund

\$300 per educator

The purpose of this fund is to provide resources or activities beyond normal classroom instruction that motivate and inspire students to learn. Grants are available for Polk County elementary school educators who wish to directly benefit one or more students by creating a unique learning experience.

Rick Howell, a Polk County educator, who had a dream of motivating teachers and students to go above and beyond in their pursuit of academic excellence and who focused on helping the individual student succeed, inspired Elementary Seeds for Education.

The dollars available for grants increase with donations. All donated funds are immediately available for grants.



Grantwriting for Public Safety Organizations Fund **\$5,000**

The Board of Polk County Community Foundation developed this grant program in 2010 to help local public safety organizations enhance their expertise in grantwriting and learn more about non-local grants that are available to fund equipment and training for public safety organizations. Applications for this fund are available at the Community Foundation.



Kirby Civic Events Fund **\$2,000**

The Kirby Endowment has a fund for civic events in the Tryon area. Every year, the Polk County Community Foundation awards grants from this fund to one or more organizations in support of enjoyable civic events in the Tryon area. These civic events must be free to the public.

The Civic Events Fund is part of the Kirby Endowment Fund. The Kirby Endowment Fund, which is administered by the Polk County Community Foundation, supports 12 different organizations and 27 different endowment funds providing annual grants and awards. One of the charitable dreams of the Kirby family is to provide edification and enjoyment to area residents of all ages and walks of life.

Kirby Harmon Field Fund **\$4,000**

Grants may be awarded to support sports and recreational activities oriented toward the development of teamwork and good citizenship among the youth in the area. The events must be free to the public and held at Harmon Field. Materials and minor capital improvements may be part of the fund request, if they are a part of the activity.

Grant funds will be awarded by the Polk County Community Foundation to local organizations who plan sports and recreational activities at Harmon Field oriented toward the development of teamwork and good citizenship among the youth in our area. For example, this fund supported a series of free tennis clinics for area youth and the “Kirby Cup”, a free soccer camp. Successful applications will be creative and will stay within the fund guidelines: activities are free to participants; all activities supported by the fund are held at Harmon Field; activities are for youth in our area; and activities are sports or recreational and develop teamwork and good citizenship. Equipment, materials and minor capital improvements may be part of the grant request if they are part of the activity.

The Harmon Field Youth Activities Fund is part of the Kirby Endowment Fund. The Kirby Endowment Fund, which is administered by the Polk County Community Foundation, supports 12 different organizations and 27 different endowment funds providing annual grants and awards. One of the Kirby family's goals is to provide edification and enjoyment to area residents of all ages and walks of life.

Kirby Rogers Park Innovative Events Fund

\$7,000

The Kirby family established the Rogers Park Fund to encourage local groups to enjoy and share this lovely park. The events must be entertaining, educational and innovative. You could put on a play or a concert. Screen an outdoor movie, complete with popcorn. How about a Shakespeare festival? Or a Battle of the Bands? A gardening seminar? The only restriction is that the event, whether educational or purely entertaining, must be free to the public. (If there is a donation box, any profits must be returned to the Kirby Rogers Park Fund at the Polk County Community Foundation.)

The cost of using the park, advertising the event, renting a sound system, paying the entertainers, even the popcorn, can all be paid out of the Kirby Rogers Park Fund. All you have to do is put on the event and take the bows.

Use your imagination. (Hint: the money comes from the Innovative Events Fund.) Get your group together to brainstorm and see how you can put your best faces forward in Rogers Park.

The Rogers Park Fund is part of the Kirby Endowment Fund. The Kirby Endowment Fund, which is administered by the Polk County Community Foundation, supports 12 different organizations and 27 different endowment funds providing annual grants and awards. One of the Kirby family's goals is to provide edification and enjoyment to area residents of all ages and walks of life.



Middle School Educators Fund

\$300 per educator

The purpose of this fund is to provide resources or activities beyond normal classroom instruction that motivate and inspire students to learn. Grants are available for Polk County middle school educators who wish to directly benefit one or more students by creating a unique learning experience.

The Middle School Educators Fund was established by Cathie Campbell whose thirty years as a middle school teacher and ten years as the Grants Manager at the Polk County Community Foundation enabled her to design this initiative to increase community involvement in local classrooms.

The dollars available for grants increase with donations. All donated funds are immediately available for grants.



REACH Fund**\$500 per student**

Teachers and mentors who have students with particular talents are encouraged to contact the Grant Manager at the Community Foundation for information about the REACH Fund.

This fund serves students whose family financial constraints may limit their participation in special learning opportunities which are tailored to the students' unique talents.

REACH helps teachers who wish to assist talented students realize their potential. For example, this fund enabled a student who qualified through regional competition to attend the national technology fair competition.

**Saluda Community Fund****\$11,000**

The Saluda Community Fund celebrates Saluda! An anonymous donor established this competitive grant fund in 2006 to benefit Saluda organizations that are serving the residents of Saluda. The donor feels Saluda is “the most unique place on the planet; there is a sense in people of being where they belong.” The generous gift that established this visionary fund was made in honor of the donor’s family and in celebration of the citizens of Saluda.

“While there are a lot of small towns in America that seem to be dying, Saluda has the energy it takes to survive. There is hardly any problem that this little place can’t solve; I want to see what a little grease will do.”

— Anonymous donor

“This is an important new fund that will encourage organizations in Saluda to dream bigger dreams, develop new projects, and strengthen existing programs. It was exciting and inspiring to work with this anonymous donor to accomplish this broad goal of supporting and celebrating community life in Saluda.”

— Elizabeth Nager, President & CEO
Polk County Community Foundation

Any organization that is located in Saluda and serves the residents of Saluda is eligible to apply. Saluda nonprofits, Saluda organizations supported by tax dollars, and other Saluda organizations engaged in charitable or civic projects to benefit Saluda residents are all welcome to apply.

Grants may be awarded for (a) civic events in Saluda which are open to residents of Saluda and may be attended by others as well, (b) non-recurring expenses or capital projects like repairs to roofs, remodeling and the purchase of equipment which will last for some years (however, no more than one-half of the annual distribution should be awarded for the capital projects of any one organization), and (c) other special projects considered worthwhile by the Polk County Community Foundation.



Priscilla & Ellis D. Slater Excellence in Teaching Awards **\$25,000**

The Priscilla & Ellis D. Slater Excellence in Teaching Awards program intends to strengthen the public school system within the Polk County and Landrum communities by encouraging professional growth and development of local classroom teachers. To be eligible, you must be a classroom teacher or librarian in the Polk County or Landrum public schools and work directly with students.

Many teachers have used their grants to work on Master's degrees directly related to their classroom instruction. Others have received grants to attend professional conferences in their teaching fields. Still others have participated in or created unique educational trips which enabled them to bring back to the classroom their personal experiences related to the curriculum. Consider the opportunities and possibilities of what you could do with a grant to improve your teaching skills and classroom impact. All projects shall directly affect and enhance classroom performance. The committee is interested in all applications, and encourages creativity.



Student Intern Program **\$15,000**

Nonprofit agencies and governmental entities in our area receive grants to hire local high school students as interns for eight weeks in the summer. The agency is responsible for the hiring of interns who meet the age, residency and other criteria set by the Foundation.

The Polk County Community Foundation will provide the grant directly to the agency. The agency will be responsible for the intern's hiring, training and salary payments. The intern is an employee of the agency.

The Foundation supports employment opportunities that benefit both the agency and the intern. Grants provide for funding of the salary of the intern plus the agency's share of FICA. Each intern's salary is to be treated as income to the intern, subject to FICA and income taxes.

Agencies:

Participating agencies must be actively offering charitable and beneficial programs within the area served by the Polk County Community Foundation. Priority will be given to challenging, well-supervised internships that provide interns with a meaningful role in planning and carrying out a special program or project of the agency.

Preference will be given to agencies providing internships with the following components:

- An assignment that has broadly applicable learning experiences
- An assignment to a special project or distinct set of ongoing responsibilities that develops technical/professional skills
- An orientation program that is complete and thorough

- Effective supervision of the intern and mechanisms that help the intern recognize what he or she is learning with emphasis on the importance of nonprofit service to American society, specifically to our community.

Interns:

Please refer to the grant application for eligibility requirements for the local high school student summer interns.

Interns will be asked to fill out a report form regarding their experiences as an intern with the agency.



Unrestricted Grants

Ever since its founding in 1975, the Polk County Community Foundation has sought to improve the quality of life for all citizens in the area centered in and around Polk County. The unrestricted funds of the foundation serve a particularly important purpose because they allow the Board of Directors the freedom to address the needs of the community as they change from time to time.

There are several Unrestricted Funds: The Merlin G. and Elenore W. Robertson Fund, the Williams Fund, the Book of Memory Fund, the Anonymous Fund and the general Unrestricted Fund. Some donors choose to have named unrestricted funds and some choose to add their gifts or bequests to the general Unrestricted Fund. Donations of all sizes become part of the general Unrestricted Fund when donors instruct the Community Foundation to use their donations “to help in any way” or “at the discretion of the Board”.

The Board of the Marjorie M. and Lawrence R. Bradley Endowment Fund contributes to the annual distribution budget for unrestricted grants.

Memorial gifts to the Community Foundation are added to the Book of Memory Fund, which is an Unrestricted Fund, and in this case, names are inscribed in the Community Foundation’s Book of Memory, which is displayed in our lobby.

Each year a percentage of the unrestricted funds is awarded to local organizations which apply for grants to fund projects of value to our community such as capital expenses (non-recurring budget items), new projects and programs. Basic operating expenses may be funded in the case of start-up organizations, small nonprofit organizations with operating budgets under \$50,000 in the prior fiscal year, and in other exceptional circumstances. The Unrestricted Grants Committee of the Polk County Community Foundation reviews grant requests and presents its recommendations to the Board for approval.

Grants are not normally awarded for expenses already incurred, or for scholarships or monetary awards to be given by the applicant organization. The Community Foundation prohibits funding of political parties or candidates, lobbying, courtesy advertising, benefit tickets, fundraisers, telephone or other direct solicitations, and medical research. Please refer to the grant application for additional information.

Section IV: Marjorie M. and Lawrence R. Bradley Endowment Fund of Polk County, North Carolina

The late Mr. and Mrs. Bradley created the Marjorie M. & Lawrence R. Bradley Endowment Fund of Polk County, North Carolina in 2005. Mr. and Mrs. Bradley moved to their Tryon home, “Puddin’ Hill”, from New York in 1951. The Bradleys enjoyed many local activities including tennis, golf, and events at the Tryon Fine Arts Center. Mr. Bradley was a chemical engineer who successfully operated a number of manufacturing businesses, including paint, until his death in 1997 at age 95. He served as a director of the Polk County Community Foundation in the 1970’s.

Mrs. Bradley died at home at age 96 and left virtually her entire estate to create a charitable fund for the benefit of Polk County. This generous bequest directed the Board of the Polk County Community Foundation to implement the Bradleys’ charitable dreams of providing charitable, education, medical and community benefits to their community.

The Bradley Fund’s Board of Directors is required to keep the entire gift forever. Grants may be awarded when the dollar value of the Bradley Fund is more than the dollar value of the original gift. Only this growth may be given away in order to preserve the original gift as an endowment fund to benefit Polk County in perpetuity.

The first grants and scholarships were awarded in 2007 immediately after the estate was settled.

There are several Bradley grant programs for the long-term benefit of the Polk County community: Bradley Community Benefit Grants, Bradley Unrestricted Grants, and Bradley Education Awards.

A. Bradley Community Benefit Grants

Bradley Community Benefit grants shall significantly improve the quality of life of Polk County residents for generations. The Bradley Board shall seek grant making opportunities which result in long-term impacts for our community as a whole and which may require a long-range view. Funds shall be made available for unusual grants, grants which may require quick action to achieve the desired result, and other grants which further the vision of striving to make Polk County an even more desirable place to live for generations to come. When appropriate, naming opportunities shall be sought to honor the Bradleys.

1. Bradley Planning and Education Grants

\$20,000

Grants may be awarded for models, studies, seed money, conferences, learning opportunities, or development of plans which are intended to lead to a significant long-term benefit for our community as a whole. These grants should ultimately result in making Polk County an even more desirable place to live for generations. Grant proposals will be accepted in the areas of charitable, educational, medical and community benefits.

2. Bradley Community Benefit Grants **\$85,000**

Through 2011, preference will be given to grants that support one of the following two areas of interest; however, the Bradley Board will consider all grant proposals which are breakthrough proposals and meet the overall vision of the Bradley Community Benefit Grants to provide significant long-term benefits to our Polk County community.

- a. Direct Land Preservation and Conservation. Funded proposals would protect the natural assets of Polk County.
- b. Community Gathering Spots. Grants will be awarded for new or expanded infrastructure (land, paths or buildings) that provides a locale for neighborhood or county-wide conversations, meetings, classes, recreation, cultural experiences and events.

The intended gathering may be informal, free, and small like two neighbors walking dogs in a new local park and exchanging greetings. Or, the intended gathering may be a highly structured gathering requiring a participation fee from a self-selected group in the larger community like those who would like to see an event or take a class.

The gathering itself is not eligible for a grant; the grant proposal should describe the creation of a setting that will serve our community for generations.

3. Emergency Land Conservation Grants

Please contact the Community Foundation for more information.

4. Bradley Fund Board Discretionary Grants

The Bradley Fund's Board has some discretionary funds to use outside of the normal grantmaking cycles for grants that result in significant long-term benefits for Polk County. Please contact the Community Foundation if your organization has a pressing or compelling situation which cannot be easily addressed by one of the many other grantmaking programs.

B. Bradley Unrestricted Grants

The Bradley Unrestricted Grants will be awarded through the Polk County Community Foundation's unrestricted grantmaking process. The application and deadlines are the same as the Community Foundation's Unrestricted Grants.

C. Bradley Education Awards

1. Bradley Achievement Awards

The Bradley Achievement Awards are given to high school seniors who have the greatest potential to make our community proud of them. Achievement and potential will be evaluated by the Education Committee's review of the entire

scholarship application which includes awards, essays, extracurricular activities, grades and class rank, interviews, recommendations, and standardized test scores. The student must be a resident of Polk County.

In past years, there have been up to six awards of \$4,000 each. Students who apply for Community Foundation Education Awards will be considered for the Bradley Achievement Awards.

2. Puddin' Hill Awards

These scholarships are awarded to Polk County students at the discretion of the Scholarship Committee.

Section V: Polk County Community Foundation Programs to Support Local Nonprofits

Capacity Building Grant Programs for Local Nonprofits

1. N.C. Center for Nonprofits: Memberships

The Community Foundation provides grants to enable local nonprofits to join the Center. There is no deadline. The grant amount is the amount due for your organization's dues for your first year of membership.

2. Duke Nonprofit Management Program

Polk County Community Foundation is pleased to provide grants for half the tuition of courses offered by the Duke Nonprofit Management Program. To qualify for course fee assistance, you must reside within our service area, and work or volunteer for a local nonprofit or government organization in our service area. Please contact us for information about receiving a half tuition grant.

Nonprofit Resource Library

The Community Foundation maintains a resource library of books and other publications regarding issues of interest to nonprofits.

Section VI: Other Endowment Funds at the Polk County Community Foundation

Annually, the Community Foundation sends grant checks to local and nonlocal nonprofit organizations and churches specified by donors in their fund agreements. Many of these payments are from endowment funds which were established by donors to support their favorite charitable programs in perpetuity. This is another way the Community Foundation assists donors with their charitable dreams.

Section VII: Donor Information for Individuals and Local Charitable Organizations

Please contact Elizabeth Nager, our President & CEO, for additional information about philanthropic opportunities.

Types Of Funds

You may make a contribution of any size to any of the existing funds managed by the Community Foundation. With a gift of \$5,000 or more, you can create your own permanent endowed fund with its own name and own charitable purposes. You may create a non-permanent fund with a gift of \$2,500 or more.

Unrestricted Funds enable the Foundation to give grants for a broad variety of changing community needs, to support the creation of innovative responses to community issues, and to enhance the quality of community life. By placing no restrictions on these funds, the Board of Directors is free to make informed decisions for their use. You may create and name your own unrestricted fund, or you may contribute to the general Unrestricted Fund.

Field of Interest Funds enable the Foundation to award grants to support your areas of interest. You may want your fund to give grants to support a broad interest such as local recreational facilities and activities or a narrow interest such as local classical music performances. Our job is to award grants in support of your interests.

Designated Funds ensure that regular grants will be made to specific eligible organizations named by you. You may name one or several organizations, and a percentage of your fund's value will be distributed to your favorite charities in the name of your fund. If you like, you may specify how the organization should use the grant. For example, you may instruct us to tell the beneficiary organization to use the grant for "educational programs" or "landscape maintenance".

Scholarship Funds enable students to pursue academic goals. You set guidelines for selecting students or leave the selection to the discretion of our Scholarship Committee and Board of Directors. Gifts of any size may be added to the general scholarship fund.

Agency Endowment Funds may be established by individual donors or with agency assets. In addition to providing non-profits with a steady source of annual operating income, the Foundation provides management and gift donation services and hires professional investment managers to manage the funds. When these funds are established, the donor may specify whether they are permanent endowments or flexible funds permitting an invasion of up to 25% of the principal balance in defined circumstances

Donor Advised Funds provide maximum convenience and flexibility by enabling you to suggest contributions to charitable organizations from your fund. You receive any tax deduction the year you contribute assets, yet you may suggest grants from your fund for years to come.

Special Project Funds are non-endowed funds that are used to accomplish a specific charitable goal such as building a new library. Non-endowed funds are non-permanent funds which spent to accomplish a short-term goal.

Administrative Funds provide support for the ongoing operations of your community foundation. This enables the Community Foundation to charge minimal fees to operate funds and thus encourages local philanthropy.

We can modify any of the listed funds to suit you. Modification options include adding conditions to grants, involving other family members in the fund, starting a non-permanent fund now which will become an endowed fund when it receives assets at your death, and changing the fund from an anonymous to a named fund at your death. The possibilities are nearly limitless.

We will work with you and your advisors to design a fund around your individual tax situation and charitable goals.

Reasons To Give

Giving Back – Many of our donors express the wish to give something back to our community. The Foundation improves the quality of life in our community by supporting nonprofits, by giving scholarships to local students and by making and keeping promises to donors who seek to bestow benefits on our community. We support our local nonprofits with grants, with endowment fund management and by assisting interested philanthropists with charitable giving options.

Favorable Tax Treatment – The Polk County Community Foundation is a public charitable organization and qualifies as a 501(c)(3) under the Internal Revenue Code. This means that your gifts are deductible at the highest allowable limits for federal income tax and estate tax purposes.

Sound Financial Management – The Foundation employs a professional investment manager to invest assets entrusted to the Community Foundation. The Board of Directors and the Finance Committee ensure that the professional manager provides appropriate diversification of assets, balances the needs for safety and growth, and charges fair fees.

Community Recognition – You may name a fund after yourself or to honor or memorialize someone else. Grants are made from your named fund. The names of endowment funds shall be publicized in perpetuity. Of course, we shall respect your wishes for anonymity if that is your preference.

Accountability – Since 1975, PCCF has managed assets for donors and nonprofits and awarded grants and scholarships to benefit our community. The Foundation is lead by a Board of Directors. Our Board and committee volunteers review and award grants, oversee financial matters, and set policies. You are welcome at any time to visit our offices and meet our President & CEO, Grant Manager, Bookkeeper, and Administrative Assistant who provide professional, experienced grant and fund management. An independent, professional audit is performed annually.

Ways To Give

Cash – This is one way of supporting the work of the Foundation. Checks may be made payable to the Polk County Community Foundation

Securities (Stocks, Bonds, Mutual Funds) – Gifts of appreciated securities may provide important tax advantages. The Foundation has accounts with many local brokers so it can receive stock and bond transfers quickly. Also, the Foundation has some low and no commission arrangements with local and national brokerage firms.

Bequests – There are many ways to remember the Polk County Community Foundation in your will. The Community Foundation may be named as the residuary beneficiary of your estate, or as the recipient of a specified gift or contingent bequest. Your will or trust may establish a fund named after you to achieve your charitable goals. We can establish a fund for you now that will be funded later by a provision in your will.

Pooled Income Fund – Since 1978, our pooled income fund has combined gifts from many donors in a common investment portfolio. Pooled income funds offer immediate charitable deductions for a portion of your gift and income payable to you and your named beneficiaries over your lifetimes. After the deaths of your fund's income beneficiaries, your share of the fund's principal is paid to the Foundation to benefit the charitable organizations or purposes designated by you.

Charitable Remainder Trusts (CRT) – If you establish a CRT, you will receive an immediate tax deduction and income payable to you or other named beneficiaries over your lifetime. Charitable remainder unitrusts provide payments to you which vary according to the market value of the trust assets. Charitable remainder annuity trusts provide fixed payments to you. After your death, the assets are distributed for the charitable purposes you specified in your trust agreement. We offer trustee services for charitable remainder trusts which means that we will administer the trust during your lifetime. We employ a professional investment advisor to manage the assets when we are named as the trustee. You may name Polk County Community Foundation as the charitable beneficiary of your trust regardless of who administers the trust.

Retirement Plan Assets – If you have retirement plan assets in an IRA, 401(k), or similar plan, you may want to name Polk County Community Foundation as a secondary beneficiary or the primary beneficiary if your spouse predeceases you. You do this by changing your retirement plan Beneficiary Designation Form, not by your will. Your tax advisor can help you review the unfavorable tax treatment of these assets at the death of the owner and determine if these assets are best used to achieve your charitable goals.

Life Insurance – Polk County Community Foundation may be named as the owner and beneficiary of a previously existing or new life insurance policy.

Private Foundations' Assets – Private foundations may find it desirable to transfer assets to Polk County Community Foundation to eliminate the burdens and costs of administering a separate entity and to take advantage of the more favorable tax treatment given to public community foundations. You may establish a significant fund within the Community which retains the name and purposes of the transferring foundation.

Supporting Organization – You may use the resources of your community foundation to help you establish a separate grantmaking organization that is closely linked to the Polk County Community Foundation. For example, The Marjorie M. & Lawrence R. Bradley Endowment Fund of Polk County, North Carolina is a supporting organization which has its own Board of Directors.

The Polk County Community Foundation welcomes your questions about gifts and bequests and the establishment of new funds. Our donors are encouraged to consult with their attorneys, accountants and other financial, legal, and tax advisors. We have additional printed information about fund minimums, investment options and fees. Please contact our President & CEO, Elizabeth Nager, for more information about tailoring a fund to suit your needs.

**Polk County
Community
Foundation**

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