



Directory of
Kirby Endowment Funds,
Competitive Grant Funds
and
Donor Information

~ 2012 ~



Adie Kirby



Dave Kirby



Katherine Kirby

This publication has been made possible
through the generosity of the

Kirby Endowment Fund
at the
Polk County Community Foundation

The Polk County Community Foundation is honored to carry out the charitable wishes of Mr. & Mrs. Davis G. Kirby and Katherine Kirby in perpetuity. The annual awards and grants described in this booklet reflect the clear intent of the Kirby family as they crafted a set of endowment funds to support the organizations and activities that meant so much to them during their years in Tryon.

In 1988, the Kirby family turned to the Community Foundation seeking tools they could use to maximize and focus the impact of their charitable giving. As a result, the anonymous Tryon Area Endowment Fund was created, giving the Foundation and beneficiary organizations specific mandates for distributing and using the funds. Per the Kirbys' instructions, the fund was renamed in 2003 to celebrate the generosity of its donors and their commitment to enhancing the quality of life for everyone in our community for generations to come.

The Kirby family's legacy provides annual support to organizations and causes close to Katherine, Adie, and Dave's hearts. Their philanthropy continues to make a meaningful difference in Polk County, touching the lives of countless members of our community, just as they had envisioned.

More information about the Kirby family and the history behind the Kirby Endowment Fund may be found in this booklet.

The Polk County Community Foundation, Inc.

Since 1975, the Polk County Community Foundation has been dedicated to advancing philanthropy and improving the quality of life for all citizens in the community centered in and around Polk County.

The Foundation receives charitable donations of all sizes from community members and then distributes grants to area nonprofits, awards scholarships to local students, manages endowment funds for local nonprofits, and administers other funds tailored to the specific charitable wishes of individual donors. In 2011, 61 local students were awarded scholarships and over the last five years, more than 95 local organizations have received grants. The Foundation annually awards over \$1,000,000 in grants and scholarships to our community.

The Foundation offers a wide range of simple and flexible fund options to help donors meet their charitable goals. Donors and local nonprofits establish funds and set the criteria for distributing grants from those funds. Some funds require a competitive application process and others pay grants automatically to designated nonprofits. Planned gifts such as charitable remainder trusts and bequests are easily arranged at the Foundation.

Currently, the Foundation manages more than 195 permanent endowed funds and non-permanent funds, including charitable remainder trusts. More than fifty new funds have been established since 2005, increasing total assets by 223% to over \$42,000,000. Funds are professionally managed and distributed through a conservative spending plan, which provides steady annual distributions to meet community needs, even in the most volatile market conditions. Donations come from individuals and families in our community and grants are distributed in accordance with donors' wishes to benefit our community.

Our President & CEO, Elizabeth Nager, works with individuals and families like the Kirbys to establish endowment funds and other philanthropic vehicles available to donors. Please visit the Community Foundation for more information about charitable giving options.

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.

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Section I: 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.

The following organizations listed in this booklet receive special non-competitive Kirby Endowment Fund grants:

- AFS — Polk County Chapter
- Congregational Church of Tryon
- Foothills Equestrian Nature Center (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

AFS — Polk County Chapter: Host Family Fund **\$1,900***
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.

ASF — Polk County Chapter: Scholarship for Study Abroad Fund **\$2,200***
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 **\$1,200***
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 **\$3,200***
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 **\$3,800***
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 **\$2,200***
This grant is to ensure 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 2011, if any.*

FENCE: Operating Expense Fund **\$35,000***

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 **\$3,400***

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 **\$3,500***

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 **\$3,300***

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 **\$1,200***

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 **\$3,800***

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 2011, if any.*

Polk County Community Foundation: Kirby Civic Events Fund \$2,700
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 \$2,400*
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 \$3,700
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 and held at Harmon Field. 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 \$4,200
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 \$3,500*
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 \$1,100*
This grant is to be used in defraying operating and equipment costs.



St. Luke's Hospital: Patient Enjoyment Fund \$1,100*
This grant is to be used in support of materials and programs for the enjoyment and edification of the hospital's patients.

**This amount does not include amount carried forward from 2011, if any.*



St. Luke's Hospital Auxiliary: Katherine Kirby Nursing Scholarship Fund \$2,300*

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 \$5,300*

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 \$2,300*

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 \$5,600*

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 \$3,500*

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 \$3,400*

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 \$1,500*

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 ensure in so far as possible, annual performances and timely planning and production activities.

**This amount does not include amount carried forward from 2011, if any.*

Section II: 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. 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

The first deadline of 2012 will be Tuesday, January 24, by 1:00 pm. Additional deadlines will be listed on our website at www.polkccf.org.

Please allow at least four 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.

Additional Guidance for Grant Beneficiaries

Information provided in this Directory is not intended as comprehensive instruction to beneficiary organizations. Since Kirby endowment funds operate differently than other Community Foundation grants, we encourage heads of organizations to call or visit well in advance of deadlines for help on how to use Kirby funds in ways that are best for your organization and that ensure proper compliance with your fund's donor-established criteria.

The following information may also be of help and prompt additional questions for discussion with Foundation staff.

Receiving Grant Funds

Kirby Endowment beneficiary organizations have two options for requesting grant funds:

1. Advance Approval: Organizations may present a budget for a future project before the deadline for review by the Kirby Endowment Committee. The committee will review the project and may advance funds for budget items that meet the fund's criteria. After grant funds are spent, the organization submits receipts to verify expenses approved in the budget.
2. Reimbursement: Organizations may incur costs for the project first and then submit receipts and a reimbursement request for committee review. Expenses that meet the established criteria will be reimbursed to the organization.

Free Events

Grants for events described as “free” in this handbook must meet the following criteria established by the Kirby family:

1. Event attendees may not be asked for contributions.
2. The event may not include the sale of food, or merchandise, or charges for entertainment.
3. Gifts of merchandise and money as well as volunteers are most welcome to defray additional costs beyond those covered by the grant. However, the giver must remain anonymous, so that the event in no way becomes a marketing venture.

Section III: Competitive Grant Funds

Grant information provided in this section is intended to be introductory rather than comprehensive. More detail regarding eligibility criteria, funding levels and deadlines for submission is provided in each grant application. We encourage heads of organizations to call or visit well in advance of deadlines for additional guidance on how to best match proposals with the most appropriate funds, according to the donor-established criteria.

General Interest Grants

Unrestricted Grants

The Unrestricted Funds of the Polk County Community Foundation serve a particularly important purpose because they allow the Board of Directors the freedom to develop grantmaking programs and award grants to address the needs of the community as they change over time. Unrestricted grants are awarded to fund projects of value to our community such as capital expenses (non-recurring annual budget items), new projects and new programs. Basic operating expenses may be funded in the case of start-up organizations, small nonprofit organizations with operating expenses under \$75,000 in the prior fiscal year, and in exceptional circumstances. Grant proposals are accepted from area nonprofits and governmental entities who share the Foundation's goal of improving the quality of life in our local community.

Many generous citizens who value our community have contributed to the Foundation's unrestricted grantmaking funds since 1975. Some donors choose to have named Unrestricted Funds and some choose to add their gifts or bequests to the general Unrestricted Fund.

There are many named funds that support Unrestricted Grants: Marjorie M. & Lawrence R. Bradley Endowment Fund of Polk County, North Carolina; the Merlin G. and Elenore W. Robertson Fund; the Williams Fund; the Book of Memory Fund; the Anonymous Fund and the general Unrestricted Fund. The Edward E. and Suzanne K. Plumly Fund, Abie Proudfoot Memorial Fund, and Thomas J. Kofodimos Charitable Fund are permanent endowed funds which make annual contributions to the Unrestricted Fund.

This fund has received significant support from recent planned gifts from Bertha B. Brown, John Lewis and Ramona H. Craddock, Paul Culberson, Marjorie Deobald, Harry and Dixie Evans, Paula St. George Joyce, Werner Mueller, Edwena Lee Ongar, Lawrence Pexton, Allan Safford, Dorcas R. Sparr, and Esther Wallace.

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 Samuel and Stephanie White Fund is an endowed Unrestricted Fund that gives preference for grants to seven local organizations.

Memorial gifts to the Community Foundation are added to the **Book of Memory Fund**, which is an Unrestricted Fund. Names are inscribed in the Community Foundation's Book of Memory, which is displayed in our lobby.



Marjorie M. and Lawrence R. Bradley Endowment Fund of Polk County, NC

The late Mr. and Mrs. Bradley created the Marjorie M. & Lawrence R. Bradley Endowment Fund of Polk County, North Carolina in 2005, leaving virtually their entire estate 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.

There are several Bradley grant programs for the long-term benefit of the Polk County community. In addition to the Bradley Community Benefit Grants listed below, the Bradley Fund contributes to the annual distribution budget for Unrestricted Grants and provides college scholarships through the Bradley Achievement Awards and the Puddin' Hill Awards.

1. Bradley Planning and Studies for Breakthrough Benefits

Bradley Planning & Studies grants are intended to fund breakthrough initiatives, projects, and learning that have "game-changing" potential for Polk County. Grants may be awarded for models, studies, seed money, plan development, conferences or other learning opportunities for staff and/or board members; all of which are intended to lead to a significant long-term benefit for our community as a whole. Past grants have enabled Polk County representatives to investigate innovative strategies and develop critical expertise for enhancing our community. Visits to New England agricultural sites funded by Bradley grants contributed to the creation of the Mill Spring Agricultural Development Center.

2. Bradley Breakthrough Community Benefit Grants

All Bradley Breakthrough Community Benefit Grants must fall within the parameters of the Bradley vision of significantly improving the quality of life of Polk County residents for generations. The Bradley Board shall seek grantmaking opportunities which result in long-term impacts for our community as a whole and which may require a long-range view. Past grants have purchased and protected land for public benefit, including Alexander's Ford at Bradley Nature Preserve and a Bradley Nature Preserve in Saluda.

3. Emergency Land Conservation Grants

The Bradley Fund recently helped the Town of Tryon realize an opportunity to acquire Vaughn's Creek for a public park. If your organization has an unexpected opportunity to conserve land in Polk County, 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.



Student Intern Program

The Student Intern Program is an innovation of the Board of Directors to support summer employment opportunities that benefit both local youth and community agencies in our area. Grants provide for funding of the salary of the intern. Interns have run the lighting at the Tryon Fine Arts Center, assisted with summer reading programs at the Polk County Library and studied turf management by maintaining the grounds at Harmon Field.



Area of Interest Grants

The Funds described in this section were established by donors who wanted to make a difference in particular aspects of community life. The donors outlined specific criteria for eligibility and grants are awarded in accordance with their wishes.

Dr. William R. Bosien Fund

Established in 1981 to honor the life and work of Dr. Bosien who gave twenty-five years of dedicated service to this area, grants from this fund enhance the availability of medical care for patients unable to afford care. The fund also supports the continuing education of St. Luke's Hospital and local community health center staff and provides medical educational programs for the general public.



Paul Culberson Agricultural Development Fund

Established in 1991 to recognize Paul Culberson for his outstanding contributions to all areas of our community, this fund provides grants for the advancement of agriculture in our community. Past Culberson Agricultural grants have been awarded for community gardens, farmer's markets and to establish Polk County as an American Viticultural Area.



Paul Culberson Quality Local Food Initiative Fund

Established in 2011 as a Board of Directors initiative to honor Paul Culberson's generous gift to the Foundation, the Culberson Quality Local Food Initiative provides grants to increase the production and consumption of quality food in our community. Inaugural grants from this fund have supported sustainable cover crop management systems and helped the Polk County School Farm expand its operations to add registered Boer goats, a dwarf apple orchard, historical garden, and new animal science barn.



Mary F. Kessler Fund

Mary Kessler's fond connection to the Tryon and Landrum communities and her desire to have a permanent philanthropic role in them led her to create this generous endowment fund. Kessler grants support projects in Tryon and Landrum that result in physical and scenic improvements, development, or beautification, as well as those with cultural, intellectual, and educational benefits. Past Kessler awards have funded multiple Streetscape improvements in Tryon, restoration of the historic Landrum Railroad Depot, and O.P. Earle Elementary School's Community Arts Evenings, which involved local artists in the arts education of its students and the public.



Saluda Community Fund

An anonymous donor who loves Saluda established this competitive grant fund in 2006 to benefit Saluda organizations that are serving the residents of Saluda. Past grants have been awarded to support community events such as The Saluda Art and Music Festival and summer reading programs, as well as roof repairs for the Saluda Medical Center. Saluda Community Fund awards have also funded kudzu eradication projects, walking paths, and other beautification initiatives.



Grants to Educators

Priscilla & Ellis D. Slater Excellence in Teaching Awards

In 1982, the Slater family left funds to the Polk County Community Foundation to be used expressly for the benefit of teachers the Polk County and Landrum community school systems, with the intention that they improve their teaching skills to benefit 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 international educational trips which enabled them to bring back to the classroom their personal experiences related to the curriculum.



Mini-Grants for Educators

The purpose of these non-endowed funds is to provide resources or activities beyond normal classroom instruction that motivate and inspire students to learn. There are specific funds available for elementary, middle and Saluda School educators. Grants are made possible by contributions from local donors who wish to support educators in motivating and inspiring students to learn.

1. Elementary Seeds for Education Fund

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. Past awards have funded books, science materials, writing centers and reading readiness rooms, and educational field trips for students.

2. Middle School Educators Fund

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. Past awards have funded cameras for special projects, art supplies, books, and history simulation materials.

3. Saluda School Fund

The Saluda School Fund was established by an anonymous donor who recognizes the importance of the Saluda School to the Saluda community now and throughout its history and wishes to honor the educators at Saluda School who make a positive impact in the life of the community. Past awards have funded puppets, gardening supplies, and a student-created anti-bullying campaign.



Tryon Area Event Grants

These funds are part of the Kirby Endowment Fund, described in Section II of this booklet. 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. All funded events are free to the public.

Kirby Civic Events Fund

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. Past grants have fully funded events such as the “Do-It-Yourself Messiah” and programs honoring Dr. Martin Luther King, Jr.



Kirby Harmon Field Fund

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. This fund has supported a series of free tennis clinics for area youth and the “Kirby Cup,” a free soccer camp held annually at Harmon Field.



Kirby Rogers Park Innovative Events Fund

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 rev-

venues collected in excess of expenses are returned to the Rogers Park Fund. Past Rogers Park grants have funded theatrical performances, a Mark Twain impersonator, interactive events for children with musicians such as acclaimed “industrial re-percussionist” Billy Jonas and community concerts ranging from gospel to chamber music.



Capacity Building Grants & Resources to Support Local Nonprofits

The resources listed below were innovations of the Board of Directors of the Polk County Community Foundation and were designed to increase the efficiency, strength, and expertise of local organizations. In offering these grants and our resource library, the Foundation seeks to increase the capacity of organizations to fulfill their missions and positively impact our community for years to come.

Organizational Planning & Retreat Grants

The Community Foundation offers competitive grants to assist local organizations with strategic planning and Board retreats leading to long-term sustainability.



Grantwriting for Public Safety Organizations

The Board of Polk County Community Foundation dedicates funds 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.



N.C. Center for Nonprofits: Membership Grants

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



N.C. Center for Nonprofits: Conference Tuition Grants

The Community Foundation provides grants to enable local nonprofits to attend the Center's annual conference. Please contact the Foundation about other educational opportunities offered by the N.C. Center for Nonprofits.



Duke Nonprofit Management Program Grants

Polk County Community Foundation is pleased to provide partial tuition grants for 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 served by the Foundation. Grants are paid to the nonprofit organization.



Nonprofit Resource Library

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



College Scholarships

Many donors to the Polk County Community Foundation have chosen to direct their gifts for scholarships to graduating high school seniors and adults going back to school. For more information about these scholarships, please contact the Foundation for a copy of the Kirby Handbook of Polk County Area Scholarships booklet, or view it online at www.polkccf.org.

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

Annually, the Community Foundation sends grant checks to local and nonlocal non-profit 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 V: 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 led 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, Director of Grants, 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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