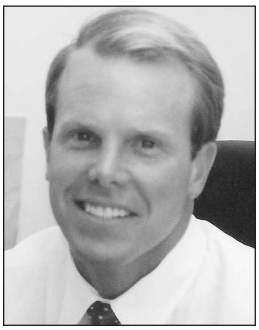
Connections

East Tennessee Foundation

Spring 2004

Resources to Enrich Lives and Strengthen Communities

THE RIGHT THINGS



Mike McClamroch

Welcome to *Connections!*

When I look at all that we have going here at the Foundation this spring, and this issue of *Connections* gives you just a taste, I'm reminded of one of my favorite quotes. Thoreau warned the *busy people* of his day that, "It's not enough that we're busy...the question is, what are we busy about?" I think that's a primary reason why I love my work. At East Tennessee Foundation we're busy about the "RIGHT THINGS."

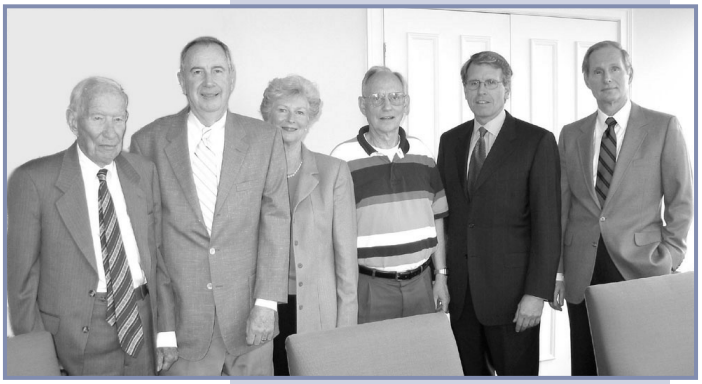
As we celebrate a month (April) which added $2.4 million to endowment (year-to-date), this issue of *Connections* will give you an inside perspective on the people and the organizations that helped make that happen. Mount Rest Home, Knox Children's Foundation, and the Kingsport Community Foundation all illustrate the powerful partnerships and flexibility ETF uses everyday *enriching lives and strengthening communities* across East Tennessee.

We are constantly taking stock, "checking our pulse" and evaluating ourselves to make sure our "busy" is hitting the mark. In April, we hosted six of seven Honorary Lifetime Board Members (those who were here at our founding) for a roundtable lunch. We gleaned important perspectives and great ideas that will become a cornerstone of our developing strategic planning process.

Finally, as if that weren't enough, we do what I like best-we announce our 2004 Youth Endowment Grants and introduce you to the chairperson of the Youth Grants Advisory Panel. Our "busy" and your generosity indeed will improve countless lives.

Michael T. McClamroch
President & CEO

2004 ETF Board of Directors



Above: Honorary Lifetime Board Members left to right: Lindsay Young, Stuart Worden, Natalie Haslam, Sam Fowler, David Martin, David White Not pictured: Bobbie Congleton

Left: Honorary Lifetime Board Members Luncheon

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See ETF on Community Television
Channel 12
Wednesdays - 12:45 PM
Fridays - 7:15 PM

MOUNT REST HOME
Devotion to the Work Will Continue

Joan Schwarzenberg

In 1894, before the days of Social Security and SSI, elderly ladies who had very little funds or family were provided a place to live and were well cared for at Mount Rest Home (MRH). The house used by MRH from1894 until the time it was closed had been built by the first Knox County sheriff, Robert Houston. MRH board members used downtown churches to cook and sell lunches at Thanksgiving to raise funds to support the home. Joan Schwarzenberg, present day *Board President*, remembers serving and helping in the kitchen. They were a *working* board: making sure that yard work was done, having porch parties with ice cream and tea for the ladies, making frequent visits to tend to their needs, and attending their funerals.

In 1971, John S. Van Gilder, a Knoxville native, made Mount Rest Home the main beneficiary of his estate. At that time the board stopped cooking lunches and the ladies were provided with a lovely home, furnished with beautiful antiques and a full staff, including a great cook. As more programs became available for the elderly, the home was closed.

In 1994, the board gave the house to the Knox Area Rescue Mission and established Mount Rest Foundation (MRF) with the remaining funds. Laura O'Callagan was the Foundation president that year and Joan Schwarzenberg became president the following year and has remained president since that time. "The goal is to help women and children in Knox County and I think we've done a really good job," said Schwarzenberg. There are presently nine board members, four are second generation: Mary Anne Beall, Angie Koella, Laura O'Callagan, and Joan Schwarzenberg (their mothers, grandmothers, or grandmothers-in-law were board members).

"Everyone on the board has a deep devotion to the work we do. It's a very pleasurable and satisfying thing when you have helped a group and you know you have made life easier and better for them," said Joan. Some of MRH's grants include: three Habitat Houses, two endowed scholarships to Pellissippi State for women who are not married and have children, a winterized building at the Girl Scouts' Camp Tanasi, the STARS program, Interfaith Health Clinic, a new facility for Boys and Girls Club, and Helen Ross McNabb. MRF gives away about $120,000 to $125,000 per year.

Grant applications are due by May 25th and grants are awarded in August. The year they started, they sent out grant application notices to different organizations to get their name known in the community. Over the years so many people have applied that they no longer have to send notices. Requests are sent to a post office box, board members investigate requests, applicant information is shared, worthy charities and funding amounts are decided, and checks are mailed.

Sam and Mary Anne Beall have had an interest and association with East Tennessee Foundation (ETF) for years. "This connection with ETF and the MRF's association with David Martin *(ETF Honorary Lifetime Board Member)*, led Mount Rest Foundation to establish a Donor Advised Fund at East Tennessee Foundation. We wanted our work to continue in the same manner after the board members are no longer in charge. We felt that East Tennessee Foundation was doing the same type of work that we are doing, only on a much larger scale. We could join ETF and preserve our funds indefinitely. The best thing about East Tennessee Foundation is that they have allowed us to feel comfortable that what we're doing will be extended forever," said Schwarzenberg.

Mary Anne Beall

"Our board was getting older with each passing year. We opted not to put any new members on the board. Most of us had a sentimental attachment to Mount Rest; my grandmother was on the board many years ago. We've been with it so long that we couldn't bring in a young person in who has no love for the place. This (the association with ETF) was just a wonderful opportunity for us to keep giving to the community the way we wanted to, with a focus on women and children. The MRF Board will continue the grantmaking for Mount Rest Foundation for as long as we have enough members on our board. Then ETF will continue making grants for Mount Rest keeping the original goals in mind.

"One interesting thing...most of the ladies were *maiden ladies*. There was no Social Security then. I took my mother out there to see a good friend of hers who was an independent retired school teacher and the nurse who delivered me when the doctor wasn't available. That's the kind of lady who was there," said Mary Anne Beall. *etf*

> *" We could join ETF and preserve our funds indefinitely."*

KINGSPORT COMMUNITY FOUNDATION

A One Year Anniversary

Fielding Rolston

The Kingsport Community Foundation has just had its first year anniversary operating as an East Tennessee Foundation (ETF) Affiliate Fund. An Affiliate Fund is an individual discretionary fund established with the Foundation dedicated to a particular area. It is advised by a local board of directors. Affiliates share ETF's nonprofit status to enable the receipt of a wide variety of charitable gifts, and receive administrative and support services through the ETF staff. Like ETF, Affiliates build a diverse assortment of funds, from donor advised to scholarships, to offer an entire spectrum of vehicles for charitable giving.

For a number of years there had been an interest in establishing a foundation in Kingsport. About five years ago some visioning work by Kingsport Tomorrow recognized the tremendous amount of wealth that will transfer between generations over the next 10 or 15 years. "Kingsport did not have a vehicle in place for donors interested in contributing to the quality of life in Kingsport," said Fielding Rolston, *Board Chairman* of Kingsport Community Foundation (KCF).

As Fielding worked with a wide variety of nonprofit community organizations (colleges, United Way, art agencies, etc.), he saw how difficult it was for them to operate without some type of endowment fund. "I think this will become more and more important to some of the projects we've started in the past and to new endeavors that address needs in the future," said Fielding.

Establishing a foundation was considered and they soon recognized that to have the expertise in investment, accounting and reporting necessary to manage a foundation was going to be expensive. During their search for ways to obtain that expertise, they learned of the Fund for Greene County and its Affiliate Fund status with East Tennessee Foundation. "As we became acquainted with ETF's work in Greeneville, we found it a real good option to provide the expertise in a way that is affordable when you're getting started," said Rolston.

An early strategy for KCF was to look at increasing their visibility by joining forces with the Spirit Renewal Campaign. It provided an opportunity to get the Kingsport Community Foundation name in front of the people and provide education about the Foundation. The consolidated campaign needed the expertise that KCF could bring through East Tennessee Foundation: tax exempt status, necessary reporting, essential credibility to the campaign. "We were trying to be careful helping the community understand that this was only one initial effort and different from many of the things we'll be involved in as we go forward," said Fielding.

The Renewal Campaign brought about a sense of community, particularly with funding sources. It consolidated a lot of separate efforts into one campaign with one "ask" for the business and individual donors. A structure was established for important Kingsport community projects that totaled over $13 million:

- A YMCA Building - they were operating out of leased space
- Athletic Field Enhancement - softball/baseball complex, and soccer complex
- Community Parks - refurbishing a center city park, a new skate park.

As a result of sharing information through talks to civic clubs and "anyone else who would listen," Fielding has identified future funding sources to grow the KCF endowment: small agency endowments, individuals who have the ability and interest to establish a private foundation or work with KCF, and donor advised funds. "There is growing recognition among those individuals that private foundations are very costly endeavors unless you have $10 million to commit to that purpose," said Rolston.

> *"Our whole purpose is to help the community donors maximize their contributions and award grants."*

"Our whole purpose is to help the community donors maximize their contributions and award grants. We're really trying to bring donors and deeds together to enrich lives and strengthen the Kingsport community, continued Rolston.

"We're most appreciative of the attention and devotion that we've gotten from ETF through Terry Holley. Her trips and the work she's done have educated us in setting up a good structure that will be very productive for the community as we move forward." *etf*

KNOX CHILDREN'S FOUNDATION

The Organization Changes But Not Its Purpose

Marnie Page

The Knox Children's Foundation (KCF) board recently dissolved their foundation and placed the assets in the East Tennessee Foundation (ETF) Youth Endowment. This action almost doubles the size of the Youth Endowment, thus making greater funding available to address issues placing young people at-risk of not reaching their full potential. The KCF board cited as its reasons for this action: cost effectiveness of managing the consolidated funds, similarity of KCF and ETF Youth Endowment purposes, and ETF grantmaking expertise.

Knox Children's Foundation was a non-governmental, nonprofit organization established in May 1965 by St. John's Orphanage, Inc. for the purpose of distributing funds held in trust for child welfare programs. St. John's Orphanage had been set up in the '30s and Dr. Veda Bateman, its director, kept excellent records. All the children's orphanage records were given to the McClung Collection. Bateman also served on the KCF board from its beginning until 2000. Besides Dr. Bateman, some other long-term members of KCF were Mrs. Cecil Matheney, Mr. Hugh Sanford, Mrs. Jerry Burdett, Mrs. Mary Gillespie, Mr. Bob Killefer and Mr. McAfee Lee.

Estates that had bequeathed money to St. John's Orphanage also became part of Knox Children's Foundation whose mission was: **Grants shall be restricted to child welfare purposes of a charitable, educational, cultural, therapeutic, or recreational nature and to applicants serving primarily the children of Knox County.**

The KCF grant records are now with the St. John's Orphanage records at McClung Collection. Over the years a wide variety of organizations received grants such as: Child and Family Services, East Tennessee Children's Rehab Center, Girl's Club, Helen Ross McNabb, UT Psychology Dept., YWCA, Tanasi Girl Scouts, and many others.

"The administrative part was where we were weakest," said Marnie Page, *KCF Board Member*. "With an all volunteer board it was difficult to have time to keep up with some the issues: marketing expertise to heighten grantee awareness and grant follow-up. We wanted the money to be used in the best way possible to meet the needs of the community. We weren't confident that we had the time to do that as they had when KCF first started," said Page.

David Reynolds

"Even board members who had been involved with KCF for many, many years thought the alliance with ETF made sense," said David Reynolds, *KCF Board Member*. "We had a choice of remaining intact and having ETF manage the money or dissolving the foundation and putting the KCF funds into the ETF Youth Endowment. We saw that ETF was doing the same thing we were doing in looking at grants, but they were doing it in a much more efficient way with more in-depth analysis and follow-up ability from staff. For us there was a concern that the funds that we had been entrusted with would be managed in appropriate ways to ensure their availability to the children of this community for years to come. We feel like the ETF staff and their reputation will bring to the surface those people and groups in our region who are serving children well," said Reynolds.

One of the concerns about moving the fund to East Tennessee Foundation was that the Foundation serves 24 counties in East Tennessee and the original intent of KCF's donors was the children of Knox County. The *Nine Counties/One Vision* visioning process expanded their thinking from a county to a region.

"I think it's a good fit for our foundation. The goals are similar and the former KCF board members who served on the ETF grants panel last year were pleased with the quality of the grants. ETF will be able to increase the amount that is awarded," said Page.

etf

2004 YOUTH ENDOWMENT AWARDS

With funding support from the following funds of the East Tennessee Foundation:
Frederic and Dorothea King Cady Memorial Trust Fund
Samuel and Katherine Jones Fund for Youth
Youth Endowment Foster Care Scholarship Fund

The following awards are two-year continuation grants. The Foundation instituted a two-year grant cycle as part of a strategy to help youth-serving organizations build their capacity to 1) establish new programs or strengthen existing programs, 2) plan and implement programs and projects which address long-range, innovative solutions to issues, and 3) secure on-going sources of funding.

Category I: Institutional Excellence

Anderson County

CASA of the Tennessee Heartland
Three-fourths time Training Coordinator to recuit and train volunteer advocates for abused and neglected children in Anderson, Campbell, Morgan, Roane and Scott counties.

Community Mediation Services
Teen and Parent Mediation targets teens whose behavior puts them at-risk of being placed in state's custody, becoming school dropouts, substance abusers, and/or delinquents.

Knox County

Emerald Youth Foundation
Equipping Leaders Initiative develops leadership behaviors in the lives of children and youth by applying a holistic approach.

Category II: Creative Solutions

Anderson County

Anderson County Schools
Student-run cafe will train special education high school students to enter the food service industry. Students will plan, purchase, prepare and serve lunch and manage every aspect of running a cafe.

Campbell County

Regional Education and Community Health Services (REACHS)
Child Abuse Prevention (CAP) program and an Alcohol and Drug Youth Support Group initiative will educate youth about alcohol and drug addiction and expand the parenting education program.

Greene County

George Clem Neighborhood Association
Fiscal Sponsor: Rural Resources
After-school and summer tutoring and mentoring program for children in the Wesley Heights area of Greeneville.

Greeneville City Schools
Get Real: Survival Skills for Real Life program addresses school violence, anti-social behavior, school drop out, and other behavioral issues with students at Greeneville Middle School.

Hancock County

Jubilee Project, Inc.
Jubilee YEAR (Youth Empowerment, Advancement, and Responsibility). Project empowers youth by improving their self-esteem and by preparing them to become healthy, responsible adults.

Knox County

CASA A Child's Voice in Court, Inc.
Training to prepare community volunteers to become Court Appointed Special Advocates to work with abused and neglected children of Blount, Hamblen, Knox and Sevier counties.

Crutcher Memorial Youth Enrichment Center
Reading for Success program utilizes the Reading Counts computer-based program to strengthen reading skills for elementary and middle school students.

Knox County Government
Education through Experience, a Community Law Office project in which youth work through real-life everyday challenges and experiences as a means of learning about resources and skills.

Knoxville Police Department
An annual summer camp at the Middle School Youth Academy will build positive relationships between at-risk youth and Knoxville police officers, and a Nine County Regional Workshop will help build or enhance youth services programs in the community.

Knoxville's Promise/Alliance for Youth
"Go Girl Go" program for teenage girls utilizes the Women's Sports Foundation curriculum along with yoga, golf and tennis classes to build self-esteem, self-respect and self-confidence.

Lisa Ross Birth and Women's Center
The Teen Pregnancy Outreach Project identifies pregnant teens, provides quality prenatal care and referrals to area social service agencies, offers weekly peer group meetings, and helps identify educational and career goals.

Metropolitan Drug Commission
Tennessee STAGE Camps increase decision-making skills for at-risk teens through in-class scenarios, daily take-home written activities and group theatre exercises.

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Henrietta Grant

A SENSE OF RESPONSIBILITY
Henrietta Grant

Henrietta Grant, an East Tennessee Foundation board member, recently served as chairperson for the East Tennessee Foundation (ETF) Youth Endowment Grants Panel. The Youth Endowment helps shape and secure the lives of youth in East Tennessee. Henrietta became very familiar with shaping young lives when she enjoyed serving as a school administrator for many years. She has found her experiences in the school system helpful as she carries out her varied ETF responsibilities.

"My work with children in East Tennessee was most gratifying and I wouldn't give anything for that experience. I do think, however, as you go along in life, as you mature, you get to do more things that give you pleasure and joy. I have felt that way about East Tennessee Foundation.

"The panel was a great mix of people; people who are in business, people who are retired, people who work with children, people who have a lot of experience and who were very supportive of me. They helped me to do what had to be done.

"I had read the proposals twice (because I was so afraid I would mess up) so I would know what they were saying. Well, to my amazement, everyone else had read them twice, too. Everybody was very familiar with the projects. We discussed the merits of each proposal and then went about the work. We started at 8:30 am and by 1:30 pm we were finished.

"It's been a growth process for me and I've thoroughly enjoyed it. This is the second year that I've chaired the Youth Panel. I got home that evening after we'd met and I thought to myself, well old girl, you didn't do too badly. This is the second year they've asked you to do this, so it must be OK. That was a good feeling, It' s the kind of experience that not only makes you feel like you've done something worthwhile, but you enjoy the participation hearing about what's going on around us.

"I think the people that I have talked to who have the Foundation as trustee for their funds feel as I felt when we granted money for the Youth Panel. We have a great mix of people and a great committed staff who have done a good job. This is my second year of my second term on the ETF board and I'm glad to be with such a fine group of people," said Henrietta. Henrietta thinks East Tennessee Foundation is a wonderful resource for Tennessee, especially for the rural communities and those who live directly in the city.

Henrietta attributes her willingness to give so much time to ETF and other organizations to the way she was raised. To whom much is given, much is expected. Unlike many young people in her time Henrietta was given the opportunity to go to school by her parents and she was expected to achieve. And she did. After Henrietta graduated from Knoxville College, her mother (her father agreed with most everything her mother said) made it known that she was to get a masters degree. When Henrietta replied that she was tired, her mother sat her down and told her she would get tired of paying house rent, phone bills, light bills, etc. and this was the best time in her life. She went to graduate school.

"I think that since I have been in a profession where you watch children and see them grow and succeed, you feel some responsibility for that. I'm busy because I enjoy being busy and I hope I've made some contributions," said Henrietta.

She has! Henrietta spreads joy and good will wherever she goes. She will never know how very many lives she has touched, influenced, and inspired. *etf*

Cont. from page 5

Wesley House Community Center
NIA RAJA Program identifies, encourages and models healthy behaviors for anger and grief management in young men.

Scott County
Children's Center of the Cumberlands
Fiscal Sponsor: Office of the District Attorney General, 8th Judicial District of Tennessee
Child Abuse Prevention Education Program for middle schools students utilizes the "Talking About Touching" curriculum to explore issues related to sexual abuse and interpersonal violence.

Sullivan County
CASA of Sullivan County
"How Can Juvenile Court Help You" will enable CASA to investigate situations that may or may not constitute the need for a custody and/or dependent/neglect hearing. Vulnerable children will receive CASA's representation before irreparable harm is committed.

Washington County
Animals Reaching Kids, Inc.
Fiscal Sponsor: Boys to Men
"Building a Bed-der Community," a gardening program in which at-risk teens work side-by-side as part of a team that prepares, plants and cultilvates a garden.

Category III: Early Childhood Intervention

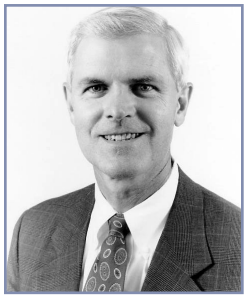
McMinn County
Health Opportunity Protection and Encouragement Center
Children's Advocacy Center provides counseling services for victims of child sex abuse in a single, child-friendly location in a manner that does not further traumatize the child.

Monroe County
Madisonville Public Library
Area daycare centers are provided with 40 children's books each month to ensure that the children have the opportunity to experience a variety of books.

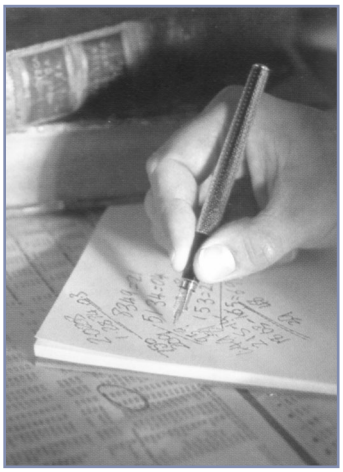
TOTAL FUNDS AWARDED: $214,400

UNDERWRITING THE FUTURE OF A NONPROFIT

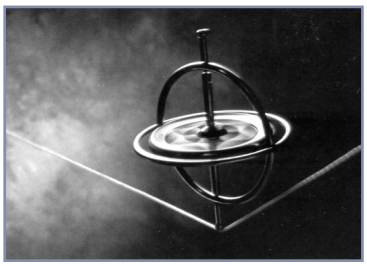
DESIGNATED/AGENCY ENDOWMENT FUND



by Bob Calloway,
VP for Advancement



...endowment strengthens the sustainability of a nonprofit organization.



Many charitable individuals develop personal or emotional connections with specific nonprofit organizations, and they want to do all they can to help perpetuate the good work of their favorite nonprofit. One of the most effective ways of achieving that goal is to establish a Designated Fund with East Tennessee Foundation, naming the nonprofit as the sole beneficiary of the fund. In most cases the Designated Fund will be endowed, meaning that the beneficiary organization will receive annual distributions based on the income earned by the fund.

One of the benefits to the donor and the agency is that East Tennessee Foundation can accept certain types of gifts that the agency may not be capable of handling. Those gifts might be in the form of appreciated securities, real estate, or items of personal property. The Foundation has the expertise to accept such assets, convert them to cash, and invest the proceeds with our investment manager. By receiving complex gifts on behalf of the agency, ETF enables the agency to focus its attention and energy on carrying out its mission in the community, unburdened from the time and effort required to handle administrative details and investment management issues.

The concept of endowment strengthens the sustainability of a nonprofit organization. As the endowment grows through the years, the annual distributions to the agency serve as a dependable stream of funds that undergirds their good work in the East Tennessee region. Even in those years when the organization experiences an unexpected shortfall in fundraising activities, the distribution from the endowment will still be forthcoming to stabilize what might have otherwise been a very lean year. What a comfort to an executive director!

...stabilize what might have otherwise been a very lean year. What a comfort to an executive director!

In addition to the twenty-two Designated Funds that ETF currently administers, we also take care of fifty-six Agency Funds. An Agency Fund is one that is established by the nonprofit organization itself, for many of the same reasons that a donor would set up a Designated Fund. Nonprofits with Agency Funds at East Tennessee Foundation include United Way of Greater Knoxville, Ronald McDonald House, Johnson City Public Library, Knoxville Museum of Art, and Boys and Girls Clubs of Greater Knoxville. These and many other nonprofit organizations have a clear understanding of the long-term benefits of an Agency Endowment at ETF. *etf*

Carolyn Schwenn Day

It's here! It's official! It's Carolyn Schwenn Day! ETF celebrated CSD in honor of Carolyn's 15 years of dedicated service to the Foundation with a surprise luncheon. Carolyn, VP for Finance and Administration is widely regarded as the Foundation's MVP.

E-Mail and Website Options

To receive this newsletter and other helpful and exciting updates from East Tennessee Foundation, please contact us at etf@etf.org, or read it on our website: www.easttennesseefoundation.org.

To send a copy of this newsletter to someone, contact us by phone, *toll-free (877) 524-1223*, (865) 524-1223 or e-mail, etf@etf.org.

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EAST TENNESSEE FOUNDATION

East Tennessee Foundation is a 501(c)(3) nonprofit corporation founded in 1986. ETF is a permanent community endowment dedicated to connecting caring donors with social needs and opportunities to enrich lives and strengthen communities now and forever.

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