Connections

East Tennessee Foundation

Spring 2007

Thoughtful giving for stronger communities, better lives

SPRINGTIME INDEED

It is spring indeed, and East Tennessee is transforming before our eyes. I, of course, cannot avoid the obvious parallel between springtime and the work of East Tennessee Foundation (ETF). Both are transforming our region.

Welcome to *Connections* Spring 2007. In this issue, we celebrate philanthropy in many forms. We welcome Joe Dawson, Bill Williams, and Fred Womack as new board members and introduce you to each of them with brief biographies. Continuing our 20th Anniversary theme of "Celebrating Our Past,"we bring you an article of remembrance by L.L. (Monty) Montgomery III, who served as ETF's board chair 2000 – 2002.

We share with you the transforming nature of three Roddy Foundation gifts – Emerald Youth Foundation, InterFaith Health Clinic, and Knoxville Habitat for Humanity.

Our grants might not always be large. A great example of this might be the economic development impact of the Appalachian Quilt Trail, an ETF special project. The grants recently awarded in our Neighborhoods Small Grants program might be small, but they have had enormous impact changing lives at the neighborhood level.

It has been a busy spring for us here at ETF: grants, advancement, stewardship, a special event at Dick and Barb Davies house, and because of medical reasons, I have been largely absent.

When life throws you a curve, you can learn a lot about yourself and about your family, friends, and "team." Well, I have seen our team in action, and, as most of you will have seen, they never missed a beat. I am so proud of them and grateful, as well. I feel like a proud father when my five-year-old, completely out of my presence, does something remarkable. We laugh sometimes when we describe our staff working like a family, but it's so true. I'm blessed, not only to be back and doing well, but also to have such a strong and supportive "family."

It's easy to make the analogy between springtime in East Tennessee and the work of ETF. We have just presented to our board our new priorities summary (more on that later). It's an exciting time to be on the ETF team and I, for one, can't wait until summer!

Michael T. McClamroch
ETF President & CEO

Dick & Barb Davies host ETF event

Howard Blum & Fred Womack attend the Davies special event

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APPALACHIAN QUILT TRAIL

Using a quilt as a metaphor to suggest the resemblance of the joining together of smaller, unmatched pieces to form a whole is nothing new. But, what about a literal double metaphor - quilts connecting quilts? Four regional hosts, including three Resource, Conservation, and Development Councils (Clinch Powell, Appalachian, and Smoky Mountain) are connecting a patchwork of rural communities.

The Appalachian Quilt Trail (AQT) is an economic development project that uses authentic heirloom quilt patterns in a variety of ways to increase heritage tourism in rural areas. In addition to creatively displaying the quilt patterns on barns, businesses, etc., AQT works with local crafts people, farmers, and local businesses to attract visitors to their region. The visitor experience will be highlighted by the rich culture, friendly people, and beautiful natural environment.

This effort is a special project of East Tennessee Foundation (ETF). As such, ETF provides financial management services for the contributions made to the project, serves the role of convener for the partners, and provides grant support. "The goal of the project is for it to be completely self-sustaining. This will require businesses in the areas to invest in the projects so

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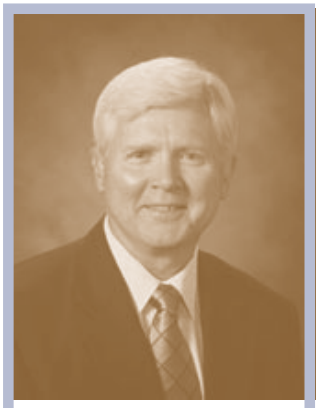
NEW BOARD MEMBERS

WELCOME NEW BOARD MEMBERS



Joe Dawson

JOE DAWSON is a Maryville, Tennessee native and received his BS from Maryville College prior to serving in the United States Army Medical Corps. He continued his education in Richmond, VA, at Medical College of Virginia at Virginia Commonwealth University where he received his Masters of Hospital Administration degree. From 1973 to 1974, he worked as an Administrative Resident at Community Hospital of Roanoke Valley, Roanoke, Virginia and from 1974 to 1977 he was Assistant Executive Director St. Mary's Hospital Richmond, Virginia.

Joe returned to Maryville and joined the staff of Blount Memorial Hospital in 1977 as Assistant Administrator and from 1985 to the present, he has served as Administrator of Blount Memorial. Since returning to Maryville, he has been very involved in the Blount County community and some of his affiliations include: First Tennessee Bank Maryville Board, Leadership Blount, Maryville College Board, Blount County Chamber of Commerce Board, Blount County Industrial Development Board Vice Chair & Chairman, United Way of Blount County Board. Joe and his wife, Sue, have two children, David and Caroline. For 17 years, Joe has worn a black and white striped shirt when he serves as a football official with the Southern Conference (1990 – 95) and Southeastern Conference (1990 – 2006).

Bill Williams

Bill Williams is a Missouri native who attended a small Oklahoma university before working at three radio and two television stations. In 1977, he moved to Knoxville as WBIR weekend anchor and three weeks later was promoted to the Monday through Friday 11 p.m. anchor. A year later Bill began anchoring both the 6 p.m. and 11 p.m. news, a position he held for 22 years before taking semi-retirement.

In 1980, Bill's concern about children's welfare, particularly children who are without permanent parents or who live in poverty, initiated the WBIR "Monday's Child" program. The program, which introduces special needs adoptable children to television viewers, has resulted in over one thousand children being placed in permanent homes. Reporting on struggles for survival by poverty stricken families in rural Appalachia led to his founding of the ten-year-old "Mission of Hope," a volunteer-supported Appalachian relief agency. He continues to report and produce "Monday's Child" and "Mission of Hope" segments on Channel 10 newscasts.

Bill enjoys working in the yard, music (he sings in his church choir and plays the piano most days), and fishing (trying for bass, crappie, bluegill or sauger). Most of all, he and his wife, Wanda, enjoy their grandchildren: Riley (eight years), Billie (six years), and Mallory Michelle (two years).

Unknown to many, Bill played the violin and French horn very well. He performed as French horn first- chair in his college concert band, and in the Enid/ Phillips Symphony Orchestra.

Fred Womack

Fred Womack is a native of East Tennessee, born in Riceville, Tennessee. Because of active involvement with the Tennessee Air National Guard, he kept ties to the region following graduation from Tennessee Wesleyan College. Fred received pilot wings in June, 1966 and served with the 134th Fighter Interceptor Group until September 1983. He held many leadership positions including Instructor Pilot, and Commander of the 134th Consolidated Maintenance Squadron. In 1988, he was selected as Commander of the Tennessee Air National Guard, the 5th largest Air National Guard organization in America. He retired from the Guard in August, 1993 with the rank of Major General. His career with Piedmont Airlines began in 1967 as First Officer and concluded as Director of Flight Operations.

Two favorite philanthropicareas that interest Fred are, aviation and children. Both of his careers involved aviation and he has always had a special emphasis in vintage aircraft. Fred has been a part of Young Eagles, a nation-wide program which introduces children between the ages of 8 and 18 to aviation. As of this year, the program has enabled well over 1,400,000

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ETF HISTORY

CATALYST & INITIATOR

Lloyd L. Montgomery III reflects on his Foundation experiences and his service as ETF Board Chair from 2000 – 2002

I was introduced to East Tennessee Foundation (ETF) in the late 80's when I was board chair at James White Fort (JWF) and Sue Walker, JWF Director, and I met with Katharine Pearson, ETF Executive Director. At that time the Foundation was managing the Fort's meager assets and I had very limited knowledge of what ETF did.

My next encounter with the Foundation was the Community Investment Fund (CIF) initiative. Using an idea that originated in Nashville, Knoxville banks created a fund to encourage inner city development with real estate projects. East Tennessee Foundation managed the funds and administered CIF projects. Resulting projects by developers who were focused on the inner city became catalysts for the residential redevelopment we see today. It was gratifying to be associated with something that could bring about improved and affordable housing in the inner city.

When Anne Sprouse asked me to serve on the board I said yes, even though I still really didn't understand all that the Foundation did. Because ETF does so many different things, an on-going issue even today is that many in our region are not aware of the Foundation's role as a catalyst and initiator of new projects.

After being vice chair, I agreed to serve as the board chair in 2000 because the more I was exposed to the work of the Foundation, the more I came to appreciate its value to East Tennessee. It became increasingly apparent to me that East Tennessee Foundation was playing a unique role in improving quality of life in our region. Also, there was a new competitive environment being created by commercial gift funds. To address this new environment and keep the Foundation viable, board and staff leaders made fact finding visits to community foundations in Charlotte and Greensboro to learn how those foundations were adapting. Following that trip, with board involvement and staff assistance, we designed and implemented "Foundation for the Future," a very specific list of tasks and goals that guided the Foundation for several years. That plan exceeded my expectations and included the Investment Alliance program, a cooperative partnership between the Foundation and select investment management firms. The Alliance allows donors with charitable funds of $250,000 or more to suggest to ETF's Investment Committee that the assets be managed by the investment firm or manager they prefer. That flexibility has helped to keep ETF competitive.

... East Tennessee Foundation was playing a unique role in improving quality of life in our region.

Some other efforts that started during my tenure included: the Kingsport Community Foundation, the Johnson County Community Foundation, Knoxville Jewish Community Family of Funds, and Project Grad. Project Grad has been outstandingly successful in helping to increase graduation rates for at-risk high school students. In 2002, shortly before the end of my last term, the Wallace-Reader's Digest Fund $1 million challenge grant for the arts was successfully matched due to the tireless efforts of Bobbie Congleton and Nancy Dender.

Lloyd L. Montgomery III

The Foundation has very strong leadership and a qualified, experienced, knowledgeable staff with passion and enthusiasm for their work. It has been my good fortune to work with all of ETF's exceptional leaders, Katharine Pearson Criss, Jerry Askew, and Mike McClamroch. Each has different gifts and ETF has benefited greatly under their guidance.

As East Tennessee Foundation executes its very strong mission, it is important for the board to remain involved in determining the Foundation's future. As a member of the Past Chairs Advisory Group, I still hear of its great work. ETF must continue to do what it has done so well in the past – build charitable resources for stronger communities, better lives.

Lloyd L. Montgomery III

EMERALD YOUTH - INTERFAITH - HABITAT

ENDOWMENT FOR THREE

In the 2007 winter edition of "Connections," an article told of grants the Roddy Foundation made that created endowments for three nonprofit organizations. At the Roddy family's suggestion, the endowments for Emerald Youth Foundation, Knoxville Habitat for Humanity, and Interfaith Health Clinic were established at East Tennessee Foundation (ETF). The gifts have offered new perspectives, opportunities, and initiatives to the organizations.

EMERALD YOUTH FOUNDATION

EMERALD YOUTH FOUNDATION

The Roddy gift is one of the largest given to Emerald Youth Foundation (EYF). "The big thing is the credibility that the endowment brings. There is a pretty significant statement that is being made by the Roddy family about their belief in our mission. They have reaffirmed the need for the sustainability of our work in the city," said Steve Diggs, EYF Executive Director.

Emerald Youth Foundation is a faith-based, urban ministry in the heart of Knoxville. It grew out of a vision of Emerald Avenue United Methodist Church in 1988 to serve children and youth in its low to moderate income community in North Knoxville, the Oakwood/Lincoln Park neighborhood. To impact the lives of more young people and their families, EYF currently works with eight urban churches across the city and plans to expand its network in the future.

This summer will be EYF's first opportunity to use the interest from the endowment. They are using the funds to support the further education of a student who continues to be a part of their ministry.

"We are so blessed to receive support from the Roddy Foundation. The Roddys have been supporters of Emerald Youth Foundation for a long time, and we're grateful they decided to establish the endowment. It's a tremendous resource to EYF, and we will actively look at ways in which we can increase it in the coming years," said Doug Kennedy, EYF Board Chair.

The Emerald Youth Foundation board is developing a comprehensive plan to grow the EYF endowment to a yet undetermined level. The Roddy Foundation gift offers a tangible piece that has heightened the interest in planned giving and will serve as a centerpiece/springboard to motivate others to consider similar contributions. "We're grateful to be working with East Tennessee Foundation in this partnership. We plan to continue learning from ETF in this whole area of building endowment," said Diggs.

For more information call 865-63-3227 or visit http://www.emeraldyouth.org.

KNOXVILLE HABITAT FOR HUMANITY

Knoxville Habitat for Humanity (KHFH) and its board of directors were very pleased and grateful to receive the Roddy Foundation grant that established the endowment at East Tennessee Foundation (ETF). The annual interest from the endowment is managed by ETF. The funds ultimately supports the building of simple, decent, affordable homes for those in need. The ability to such funding each year allows KHFH's to plan for growth, sustainability, and continuation of the organization's mission.

KNOXVILLE HABITAT FOR HUMANITY

"This is the first endowment received by Knoxville Habitat for Humanity. Ironically, Sis Roddy Mitchell was the KHFH founder. For this endowment to come from the Roddy Foundation is quite fulfilling," said Richard Isaac, board president of Knoxville Habitat for Humanity. "We hope that other local foundations and individuals will think of supporting Knoxville Habitat for Humanity in order that more homes may be built in Knox County."

Knoxville Habitat for Humanity, located at 1501 Washington

QUILT TRAIL

Continued from page 1

Avenue, is an independent, nonprofit, Christian housing ministry that partners with people of all beliefs. Knoxville Habitat for Humanity has been an affiliate of Habitat for Humanity International since 1985. They build simple, decent, affordable homes in partnership with those in need. Volunteers and future homeowners provide the labor in building the homes. Tax deductible donations of money, land, and materials are provided by individuals, organizations and corporations.

For more information call 865-523-3539 or visit www.knoxvillehabitatforhumanity.com.

INTERFAITH HEALTH CLINIC

Interfaith Health Clinic (IHC) is a health care ministry in Knoxville, Tennessee that provides affordable medical care, dental care, mental health counseling, and prescription medications for the working uninsured. The Roddy Foundation gift that established the endowment at East Tennessee Foundation is providing stability for IHC.

IHC is targeting the endowment income from the Roddy gift for the purchase of pharmaceuticals. "The patients we serve at Interfaith are the low income, working uninsured. When we think of those without health insurance, often we think of their limited access to physician care. We often forget they don't have access to prescription coverage as well. Like any physician's office, Interfaith can distribute medications. With monies from this endowment, we can purchase very needed medications for chronic problems like hypertension, diabetes, etc., and antibiotics for acute situations," said Melissa Knight, IHC Executive Director. "The assurance of continuity of care is vital and is exactly what these monies have provided."

INTERFAITH HEALTH CLINIC

"The IHC board of directors is very excited about the endowment for two reasons: first, the continuity of care that this is providing for our patients, and second, this has really jump started the commitment to an endowment. For years, we have discussed the importance and fiscal responsibility of starting this type of fund. However, an immediate need always diverted our attention, energy and resources. Now that the Roddy family had taken the lead, our planning has changed from 'shouldn't we try?' to 'how much, when, & what is the greatest need first?' Although, immediate needs continue to present themselves, this has changed our discussions into setting a course of action," said Knight.

The IHC foundation board has formed a strategic planning committee charged with diversifying funding sources. An integral part of the plan they are developing involves questions: How much do we need? Will it continue to be only for pharmaceuticals or other needs? Who do we target as donors?

For more information call 865-546-7330 or visit http://www.interfaithhealthclinic.org.

they can get the resulting economic benefits," said Alice Fleenor, AQT Director of Communications and Development. "Gaining community support and logistics have been challenging. Rural communities can be resistant to change, especially when a project is in its infancy. I am the Quilt Trail's only staff member and the project currently covers 17 counties in East Tennessee and six counties in North Carolina."

AQT, in cooperation with the Tennessee Small Business Development Centers, offers local vendors rural business development classes in heritage and agri-tourism and technical assistance in marketing. The counties in the region work together combining resources and funding efforts to increase benefits to local businesses, artisans, and economies.

It is anticipated that more and more pieces will be added to the quilt making/connecting efforts. Growth will be limited to the Appalachian region, will develop at a manageable rate, and expand in a contiguous pattern from Georgia to Maine. Virginia will soon be joining the efforts.

The Appalachian Quilt Trail has a website http://www.quilttrail.org.

GRANT AWARDS

NEIGHBORHOODS SMALL GRANTS 2007 AWARDS

East Tennessee Foundation's Neighborhoods Small Grants Program, with funding from the City of Knoxville's Community Development Department, was developed to strengthen low- to moderate-income neighborhoods in the Heart of Knoxville by supporting a wide range of community-based initiatives through grants and technical assistance.

Dandridge Avenue Neighborhood Watch
Fiscal Sponsor: Beck Cultural Exchange Center, Inc.
Funding is awarded to support attendance at the Neighborhoods USA (NUSA) Conference, neighborhood clean-ups, and National Night Out.

Fourth and Gill Neighborhood Organization
Funding is awarded to support production of a neighborhood newsletter four times per year.

Historic Fort Sanders Neighborhood Association JAMES AGEE PARK

Historic Fort Sanders Neighborhood Association
Fiscal Sponsor: East Tennessee Foundation
Funding is awarded to support the installation of entrance gates to James Agee Park, an urban park which commemorates the childhood home of the celebrated author.

Oakwood-Lincoln Park Neighborhood Association
Funding is awarded to support a communications program which includes updating the neighborhood directory, publishing newsletters and monthly information postcards, and preparing on-going promotional materials.

Old North Knoxville, Inc.
Funding is awarded to support a community park project, neighborhood newsletter and monthly meetings.

South Haven Neighborhood Organization

South Haven Neighborhood Organization
Fiscal Sponsor: East Tennessee Community Design Center
Funding is awarded to support website development, a neighborhood sign, newsletters, and housing fair sponsorship.

Vestal Community Organization
Fiscal Sponsor: East Tennessee Community Design Center
Funding is awarded to support the publication and distribution of monthly newsletters to Vestal residents.

Total Funding Awarded:
$20,935

GRANTS PANEL

Neighborhoods Small Grants Panel

Left to right: Jan Elston, Peyton Hairston, Henrietta Grant, Patricia Robledo, Mark Jackson (chair), Dr. Mark Rigsby, Ellen Adcock, and Bill Murrah

COMPETITIVE GRANTS PANELS

Similar to all of the Foundation's competitive grants panels, the Neighborhoods Small Grants Program (NSGP) Advisory Panel is chaired by a member of the Foundation's Board of Directors and staffed by community volunteers. Volunteers who are invited to serve on grants panels are knowledgeable about the issues being addressed by that particular grants program and/or represent the geographic region being served.

Grants panel members receive copies of all eligible applications several weeks prior to a panel meeting, to provide them with time to thoroughly review and evaluate each proposal. NSGP panel members convened in early April to review and discuss each eligible NSGP application and make grant awards. Their funding decisions were based on whether proposed projects would result in stronger neighborhoods and enhance the quality of life for neighborhood residents.

See ETF on Community Television - Channel 12
Tuesdays - 10:30 a.m.
Saturdays - 6:30 p.m.

HOW MUCH IS ENOUGH?

With all of the movie sequels being released this summer (Spider-Man 3, Shrek the Third, Ocean's Thirteen), I felt that this would be a good time to re-visit a topic that I mentioned in my article one year ago. The topic has to do with the appropriate inheritance to leave for our children.

In the Spring 2006 issue of "Connections," I wrote the following: "Wouldn't it be a shame if, in our efforts to be generous to our children, we gave them so much of our estate that we diminished their work ethic, stunted their initiative, and even made them lazy? What kind of an inheritance is that?"

Retirees Allocate Their Million

I should immediately go on record to say that I do not believe that an oversized inheritance will necessarily and automatically turn an energetic, hard-working heir into a dull-eyed sluggard. We have all seen situations where large inheritances have been put to good use in business successes or philanthropic endeavors. On the other hand, we have also observed situations where inheritors were not very good stewards of their money, with the end result being a wasted inheritance that benefited nobody.

Bob Calloway
V.P. for Advancement

How sad it is when the availability of wealth removes someone from the grand struggle of life, converting them from a contender and striver to a passive spectator. When asked how much of an inheritance he planned to leave his children, Warren Buffett said, "I intend to leave them enough to do anything, but not enough to do nothing." For me, that says it all.

Recently I made a presentation to a group of about thirty retirees of significant means. In a very interesting exercise, I gave each of them one million dollars in play money and instructed them to distribute the money as if it were their entire estate and they were the surviving spouse. They could choose among eight categories: their heirs and seven non-profit fields of interest. I fully expected them to leave at least seventy-five percent of their estates to their heirs. I was pleasantly surprised when they gave thirty-nine percent of their estates to their heirs and sixty-one percent to charitable organizations. That was an incredible statement of how important it is to those thirty people to leave a meaningful legacy as part of their "life portfolio."

"...enough to do anything, but not enough to do nothing."

- Warren Buffet

I think my children know how much I love them, and I think they are smart enough to know that the monetary value of what they receive from my estate is not the ultimate measure of how precious they are to me. Further, I'm pretty sure that they will whole-heartedly endorse my plan to leave a meaningful portion of my estate to a few organizations that I consider to be doing exemplary work in contributing to better lives and stronger communities in East Tennessee. Maybe I should establish a testamentary endowment at East Tennessee Foundation that would benefit those particular organizations. Then my children and grandchildren could honor me by making future gifts to the endowment. What a novel idea!

To Get the Most Out of Giving, Read...

***Charitable Strategies*,**

a free charitable giving e-newsletter helping Professional Advisors and their clients to maximize philanthropic value. To receive *Charitable Strategies*, send your request to bcalloway@etf.org.

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children to experience flying. He has worked in numerous other organizations and on several boards which encourage the public's involvement in preserving our aviation heritage. Some other affiliations include: Senior Consultant for the National Transportation Safety Board, Chair of Warbirds of America, Kiwanis Club of Maryville, Tennessee, Order of Daedalians, Experimental Aircraft Association. He currently serves as Vice-Chair of the Tennessee Wesleyan College Board of Trustees.

Fred and his wife, Teresa, have three children, Angela, Paul, and Will and two precious grandchildren, Annie (9 years) and Joseph (6 years).

Fred enjoys golf, tennis, travel, snow skiing, sport flying and air craft restoration (he restored and is presently flying a classic military trainer aircraft).

Has your contact information changed?
If so, please let us know so we can keep in touch.

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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 have a copy of this newsletter sent 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 respects, celebrates, and encourages diversity that positively contributes to our healthy and caring community.

EAST TENNESSEE FOUNDATION

East Tennessee Foundation (ETF) is a public, nonprofit, community foundation created for the purpose of building charitable resources to make communities stronger and lives better through thoughtful giving.

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