

*Where Needed Most.
To Do the Most Good.*

THE STORY OF THE

CARRIE E. AND LENA V.
GLENN FOUNDATION
OF GASTONIA, NORTH CAROLINA

Celebrating Fifty Years of Community Caring
1972–2022

BARBARA H. VOORHEES

**WHERE NEEDED MOST.
TO DO THE MOST GOOD.**

“Our sole purpose in making this foundation was to try
to have any money that we might leave go
where it is needed most and will do the most good.”

CARRIE AND LENA GLENN, MARCH 28, 1973

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THE CARRIE E. AND LENA V. GLENN FOUNDATION
GASTONIA, NORTH CAROLINA

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Dedicated to the trustees and directors of the
Carrie E. and Lena V. Glenn Foundation,
who through responsible management of foundation funds
and conscientious grantmaking decisions
have seen that money was spent
where needed most to do the most good.

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2022 GLENN FOUNDATION BOARD OF DIRECTORS

L. to r.: Ann Davis (secretary), Greg Sellers (treasurer), Jennifer Davis (chairperson), Richard Blackburn, David Rogers (vice chairperson), Dwayne Burks, David Christy, Lauren Sease Vanacore, Vincent Wong. Courtesy of the Glenn Foundation.

Foreword

W*here Needed Most. To Do the Most Good* celebrates a fifty-year legacy of philanthropy in Gaston County, North Carolina, through the Carrie E. and Lena V. Glenn Foundation. From humble beginnings in 1972 until 2022, the foundation has had a positive impact on the quality of life we all enjoy. We are a private foundation, and although we are not large by national standards, our impact in Gaston County has been considerable.

This book celebrates our collaborative partners who are the heroes of this story, Gaston County's nonprofit professionals. Their dedication to serving others through programs and services they have administered has made our community special. It also honors the foundation's boards of directors through the years as they have worked responsibly to honor Carrie and Lena Glenn's financial sacrifice and their simple request that their money go where needed most to do the most good.

The story is based on numerous sources, most of which are in the possession of the Glenn Foundation. It is the companion of *To the Stars: The Glenns of Gaston County, North Carolina. A Story of Determination, Achievement, and Charity*, which tells of William Davis and Sarah Priscilla Torrence Glenn and their ten educated offspring, including two charitable daughters. Information about the foundation found in the first three chapters of this book is similar to the last three chapters of *To the Stars* so that the two volumes can be read independently.

On behalf of the 2022 board of directors, we extend our heartfelt thanks to Barbara Voorhees for her determination and commitment to share the legacy of the Glenn sisters, the Glenn Foundation, and the impact of selfless giving through these two books, as well as to our executive director, Laura Lineberger, who is the link that helped bring it all together. We hope you will enjoy learning about the history of the Glenn Foundation and of the growth and development of Gaston County's nonprofit community.

Board of Directors

Jennifer P. Davis, Chairperson

The Carrie E. and Lena V. Glenn Foundation

June 2022

Prologue

The origins of most charitable foundations are typically found in the most laudable of circumstances, but none more unique and praiseworthy than the story of two humble sisters, Carrie Eugenia and Lena Viola Glenn, whose lives of frugality yielded a permanent vehicle to do good in their community. The story of the Carrie E. and Lena V. Glenn Foundation pays tribute to its founders and their stated desire: “To have any money that we might leave go where it is needed most and will do the most good.”

The Glenn sisters’ story has deep roots in Gaston County. Their immigrant ancestor, John Glen, was a Scotch-Irish Presbyterian who settled in what is now Gaston County, along with his second wife, Jane McLean, before the American Revolution. John fought in the Battle of Kings Mountain that stopped the British advance in the South and turned the tide of the American Revolution. Their father, William Davis Glenn, was the fourth generation of Glenns to make Gaston County home. Educated in the local schools, William joined Union Presbyterian Church and worked as a farmer, storekeeper, and photographer before being elected Gaston County Clerk of Court, and serving as salt commissioner for the county during the Civil War. When his term as clerk expired, he returned to farming and storekeeping, but his four-year term of elected office impressed upon him the value of steady employment with a steady income.

Their mother, Sarah Priscilla Torrence, eighteen years William’s junior, came from a distinguished family. The Torrences also settled in the



Eight of the ten Glenn children were born in this farmhouse that still stands on US Highway 321 South. It appears here as it was before the modern additions of siding and awnings. The back of the photograph says "Home Sweet Home." Courtesy of the Glenn Foundation archives.

area before the Revolution and were faithful members of Olney Presbyterian Church for several generations. Sarah Priscilla's maternal great-grandfather, John Wilson, served for twenty years as the elected register of deeds of Lincoln County before Gaston County was carved from southern Lincoln County. At his death, his son William Joseph Wilson (Sarah Priscilla's grandfather) succeeded his father and served another forty-eight years in the same post. William Joseph Wilson was one of the area's most prominent citizens. Two of his highly educated brothers distinguished themselves in the Presbyterian ministry.

After they married in 1870, William and Sarah Priscilla Glenn had ten children over a span of twenty-one years, five sons and five daughters. Carrie and Lena were the seventh and eighth children, born two years apart, in 1884 and 1886, respectively. Sarah Priscilla and William brought their children up in Olney Presbyterian Church and instilled in all their offspring the Presbyterian ethic of hard work and the value of educated minds. All ten children attended college. William especially drummed into his daughters' heads the importance of saving for their old age so they could

take care of themselves without reliance on others. While the parents could not provide much by way of financial assistance for their children's educations, their offspring's achievements were remarkable not only in their time but also for any generation.

The oldest, Leonidas Chalmers (1871–1951), called Lon, was valedictorian of his graduating class at the University of South Carolina. He became a teacher, principal, and school superintendent in Darlington, South Carolina, before earning a doctorate in geology from Johns Hopkins University in 1899. He retired as professor emeritus after a forty-two-year career at Vanderbilt University in Nashville, Tennessee. Lon was the family genealogist.

Lucius Newton (1873–1964), nicknamed Lush (pronounced Loosh), dropped out of Catawba College, then in Newton, North Carolina, to enter medical school at the College of Medicine of Baltimore, where he graduated seventh in his class. A respected Gaston County surgeon, he cofounded City Hospital, which became Gaston Memorial Hospital after World War II and then CaroMont Regional Medical Center. He served on the Gastonia Board of School Commissioners and the North Carolina Board of Medical Examiners. Lush returned to college while a practicing surgeon and completed his undergraduate degree from Catawba College, which had relocated to Salisbury, North Carolina, when he was almost 59 years old.

William Wilson (1875–1955), who went by Will, began his business career with the Southern Railway after two and a half years at Catawba College, followed by business college. He managed and owned textile mills for the majority of his career but also owned an orange grove in Florida for a time. In 1929, he and his family moved to Lincolnton, where his mills were located. Will served as financial advisor to his younger sisters and was faithfully solicitous of their welfare.

Ernest Pratt (1877–1896) entered Catawba College as a sophomore, but died of pneumonia at the start of his second semester, at the age of 18. His younger brother, John Howard (1882–1906), called Howard, graduated with high honors and a mechanical engineering degree from North Carolina College of Agriculture and Mechanic Arts (North Carolina State University), where he taught after graduation. He died of tuberculosis at the age of 24.

All five daughters attended the State Normal and Industrial School/College for Girls, called the Normal, in Greensboro (University of North

Carrie Eugenia Glenn graduated from the State Normal and Industrial School for Girls in 1906. She received a teaching certificate, but later earned bachelor's and master's degrees from George Peabody College for Teachers in Nashville, Tennessee. Her vision began deteriorating in college. Courtesy of the William W. Glenn family.



Carolina at Greensboro). Eula Blanche (1879–1932), the eldest, earned a lifetime teaching license to teach in North Carolina and was an exceptional teacher of English in the Gastonia city schools until her death at age 53.

Carrie Eugenia (1884–1977) received a teaching certificate from the Normal, and later earned bachelor's and master's degrees from George Peabody College of Education, in Nashville. She taught elementary grades in the Gastonia city schools and then became primary supervisor for Gaston County schools, until losing her job during the Depression, when there was no money to pay her salary. She spent the remainder of her career teaching elementary grades in the county schools.

Lena Viola (1886–1984) graduated with a lifetime teaching license from the Normal and later a certificate from Carnegie Library School in Atlanta (which merged with Emory University and awarded Lena a master's degree). Because of poor health and inordinate shyness, Lena was not employed after college but kept house for her working sisters. In 1932, at the age of 46, she began a twenty-one-year career at the Gaston County Public Library, where she blossomed, working first as a library assistant and then as the library's first cataloguer.

When illness caused May Gertrude (1889–1985), called Gertrude, to switch her studies from teaching to the business field, she graduated from the Normal with a commercial certificate and spent her career as a secretary, mostly in New York City.

When Lena Viola Glenn graduated from the State Normal and Industrial School for Girls in 1908, she was the first of her sisters to graduate in four years. She received a diploma and lifetime license to teach in North Carolina. Later, she earned a certificate from the Carnegie Library School of Atlanta. Courtesy of the William W. Glenn family.



The youngest, Annie Torrence (1892–1945), graduated with a bachelor's degree in pedagogy and taught in Concord and Statesville before she became an English teacher in the Gastonia city schools with Eula. Health problems forced her early retirement and eventual death at age 53.

The three surviving brothers married and had children, and their children had children, but the five sisters never married. By 1918, all the women but Gertrude now lived together in the family home at 407 South Chester Street in Gastonia, tending a large vegetable garden, making their own clothes, doing their own chores, and saving and investing their money with the guidance of their brother Will.

In 1961, after years of frugality and saving, as Carrie and Lena arrived in their 70s, they chose to leave their family home and the responsibilities of their old house and large yard, and move to a freestanding, two-bedroom apartment at the Presbyterian Home of High Point. Before leaving Gastonia, Carrie, Lena, and younger sister Gertrude, who was visiting, established individual trusts with the Citizens National Bank. The trust department would handle their finances, pay their bills, and manage their investments until their deaths.

For their first ten years at the Presbyterian Home, Carrie and Lena enjoyed their modern apartment, the more leisurely pace of life, sharing meals in the dining room, and meeting retired missionaries, ministers, doctors, nurses, and teachers who lived there. Their decision was a good one. Both

sisters suffered health problems, and by the end of the decade, Carrie was blind from glaucoma.

In 1971, Carrie, now 87, and Lena, now 85, moved from their apartment to a two-bedroom unit with a shared hall bathroom in the main building. By this time, Gertrude, 82, had moved from New York City and joined her sisters, bringing the three together for the first time in sixty years. They were now the only ones left of their generation from their large and accomplished family.

This is where the foundation's story begins.

CHAPTER 1

Birth of a Foundation

1961–1971

It was perhaps in April 1971, around tax time, that young trust officer George C. Winecoff III, of the Citizens National Bank, made the drive to High Point to give “Miss Carrie” and “Miss Lena,” as he called them, an update on what he later described as their “beautiful portfolios” of blue-chip stocks, bonds, and investments in local companies. At the time of this visit, George remembered, Carrie and Lena’s combined assets approached \$1 million. He observed that as the oldest sister, Miss Carrie seemed to be the leader.

“I’ll Have No Part of That”

After hearing George’s update, Carrie inquired, “Mr. Winecoff, at my death, what will it cost me in taxes?” George thought for a moment and guessed a sizeable figure, to which Carrie replied, “Well, I’ll have no part of that.” She had worked and saved for too long not to put her hard-earned savings to higher use. Carrie asked what they could do to save money on taxes. George suggested that they might give it away by establishing their own charity. The idea pleased Carrie very much. Always quiet, Lena concurred. They felt that their family members were taken care of, and that by establishing a charity, they could leave something meaningful for posterity.

When George returned to Gastonia, he told the sisters’ attorney, James B. “Jick” Garland, of the law firm of Garland Alala Bradley & Gray, of their desire to establish a charity. Jick was a well-respected attorney who had

succeeded his father, Peter Woods Garland, in handling the Glenn sisters' legal affairs.

Wasting no time, Jick consulted with Robert N. Rosebro, senior vice president and trust officer of the Citizens National Bank, who had known the sisters for many years. Carrie and Lena trusted him. Jick and George returned to High Point several times as Jick guided the sisters about the nature of a charitable trust indenture, bringing them through a learning curve as he familiarized them with the particulars of establishing a foundation. It is likely that he shaped the tone of the final document as he explored his vision with the sisters.

While Carrie and Lena's first priority was to receive an estate-tax deduction when their trust assets rolled into the foundation, equally pressing was their concern for providing for each other after their deaths, especially for Gertrude. Carrie and Lena worried that their younger sister, having lived in New York City most of her life, had not been able to save as they had and did not have the assets she needed for her care until her death. Jick assured Carrie and Lena that they could initiate the foundation with a partial amount, and that their *inter vivos* (living trust) holdings could pour into the foundation after the deaths of all three sisters. Any considerations for their other family members could occur at that time.

George remembered a return visit with the draft trust indenture as being a matter of weeks. Jick established the charity as a private foundation, which he named the Carrie E. and Lena V. Glenn Foundation. With all three sisters present, Jick read the entire trust agreement aloud, eight legal-size pages, because of Carrie's blindness. When he finished, Carrie and Lena asked no questions and required no changes. They were in complete agreement with the provisions.

The new Carrie E. and Lena V. Glenn Foundation was established "exclusively for religious, scientific, literary, educational and eleemosynary purposes." It created a governing board of trustees of not less than five nor more than seven members who would serve rotating terms. At all times during the life of the trust, one member of the board of trustees was to be an officer of the Citizens National Bank in Gastonia, and one a minister, member of the session, or chairman of the board of deacons of the First Presbyterian Church of Gastonia.

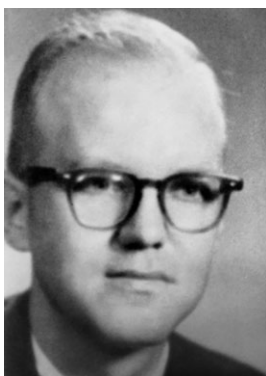
Founding Trustees

Jick selected as the founding trustees five prominent community leaders: Dr. Charles A. Glenn (nephew of Carrie and Lena), the Rev. James G. Stuart, Judith M. Miller, Hugh F. Bryant, and Robert N. Rosebro. The five served staggered terms.

Charlie Glenn, Lucius and wife Mena's middle child, was affectionately known in the community as Dr. Charlie. After his service as a surgeon in World War II, and following the sale of City Hospital, he maintained a surgical practice with his father until Lucius's death. Dr. Charlie became a Fellow in the American College of Surgeons and a member of the Rotary Club of Gastonia as his father had been, but he also served eight years on the Gaston County Board of Commissioners. His wife, Dr. Dorothy Norman Glenn, called Dr. Dorothy, had been a popular and well-known Gastonia obstetrician and gynecologist, but had closed her practice in 1967 and was working in Washington, DC, as an advisor to the Ministry of Health for the Republic of South Vietnam, representing the United States Agency for International Development. Charlie was getting ready to retire and would soon join her.

Rev. Jim Stuart was senior minister at the First Presbyterian Church of Gastonia. His appointment fulfilled the trust provision that a representative of the church serve on the board. He had arrived in Gastonia with his wife and four children in 1969. A graduate of the University of Mississippi, Jim worked as an accountant with his brother before flying thirty missions out of Italy during World War II as a navigator on a B-17 bomber. Seeing man's inhumanity to man changed his vocational direction, and following military service, he graduated from Columbia Theological Seminary in Decatur, Georgia, and entered the Presbyterian ministry. He served churches in Atlanta, Little Rock, Arkansas, and Charlotte before coming to Gastonia. Both Charlie and Jim started with three-year terms on the board.

Judy Miller was an active volunteer and knowledgeable about many community organizations. She had worked as a physical therapist after graduating from Columbia University College of Physicians and Surgeons, in New York City. Her husband, Dr. George Miller, was an orthopedic surgeon who began his career in Gastonia at the North Carolina Orthopedic



Top row, l. to r.: James B. Garland, attorney; founding trustees Charles A. Glenn and James G. Stuart. Bottom row, l. to r.: Founding trustees Judith M. Miller, Hugh Bryant, and Robert N. Rosebro. Photos of Garland, Glenn, Bryant, and Rosebro courtesy of membership directories of the Rotary Club of Gastonia, North Carolina; Stuart photo courtesy of the James G. Stuart family; Miller photo courtesy of the Judith M. Miller family.

Hospital. Judy was passionate about helping children with infantile paralysis during the polio epidemic of the early 1950s, and met George while they were working at Warm Springs, Georgia. Judy also worked at the Polio Children's Hospital, in Greensboro, before marrying and coming to Gastonia.

Hugh Bryant was a Gastonia native who grew up on South New Hope Road when it was a dirt road. He graduated from Darlington School for Boys and spent two years at Davidson College before transferring to the University of North Carolina at Chapel Hill to earn his undergraduate degree. He served in the Air National Guard for ten years following graduation. He learned the insurance business first with New England Mutual

Life Insurance Company and then for twenty-five years with Jefferson Pilot Insurance, before opening the Hugh F. Bryant, CLU, agency. He was a member of the Rotary Club of Gastonia. Judy and Hugh started with two-year terms.

Bob Rosebro was the final trustee named, and his term was for one year. He fulfilled the trust provision that a banking representative serve on the board. Bob was a Virginia native, a graduate of Hampden-Sydney College, a member of the Rotary Club of Gastonia, and active on a number of community boards. He started with the Citizens National Bank in Gastonia in 1933 and had a long association with the sisters.

When Jick was drafting the trust indenture, it was Bob who insisted that an officer of the Citizens National Bank always serve on the foundation's board of trustees, but not just to preserve the banking relationship for the future. Bob had a personal interest in the success of the foundation because of his high regard for the Glenn sisters. It proved helpful to have a trust officer serve as a colleague in the foundation's earliest days.

Charlie and Bob were nearing retirement, and Hugh, Judy, and Jim were in their 40s. With the exception of Charlie, the other four trustees were active in the work of First Presbyterian Church, as was Jick Garland. The Glenn Foundation was not established as a Presbyterian foundation and has never been one, but its origins are with First Presbyterian Church of Gastonia, and the Presbyterian connection remains.

On August 30, 1971, Carrie and Lena Glenn executed the trust indenture in Guilford County, North Carolina, while four trustees signed at Jick Garland's office and Bob signed at the bank. With the execution, both sisters transferred to the foundation municipal bonds totaling \$25,000, with Carrie contributing \$15,000 and Lena \$10,000. This would be their only investment until the death of the last of the three sisters. With these proceeds, the trust department opened a savings account to operate the foundation.

As he perfected the trust indenture, Jick simultaneously worked to accomplish the sisters' mutual goals of taking care of each other until their deaths. To do that, Jick restated the *inter vivos* trust agreements that Carrie and Lena executed at the Citizens National Bank in 1961 before their move to High Point. He also updated their wills. Only the Carrie E. Glenn Trust document survives, and it paints a picture of the sisters' well-thought-out estate plans.

Carrie Glenn's Trust

Carrie's trust was divided into two parts. The first part set aside \$61,132.38. Carrie was to receive the income from this sum during her lifetime. At her death, Lena and Gertrude's trusts would receive the income during their lifetimes. At Lena and Gertrude's deaths, proceeds would be distributed to Carrie's heirs, the children and grandson of her older brothers.

The second part dealt with Carrie's remaining assets. While she was alive, she was to receive all the income the trust produced and any principal she might need. After her death, 5 percent of the net fair-market value of her remaining assets, payable in equal quarterly installments, was to go for the "support, comfort and medical care" of her two sisters until their deaths. After the last sister died, this portion of Carrie's trust would pour into the Carrie E. and Lena V. Glenn Foundation "in a manner which would provide the grantor's estate with an estate tax charitable deduction."

Because Carrie and Lena shared the same financial goals for each other, for Gertrude, and for their foundation, Lena's trust provisions likely mirrored Carrie's. Gertrude had no stake in the foundation. She directed that at her death, her estate be distributed equally to her brothers' children and grandson through her will.

Carrie executed her trust on August 31, 1971, the day after she signed the paperwork establishing the foundation. Lena almost certainly executed her trust on the same day. The assets that transferred to Carrie's restated trust included thirteen municipal bonds, two United States treasury bonds, and stocks in twenty-eight different local and national companies. She had money in savings and loans in Belmont, Gastonia, and Mount Holly; some real estate, including thirteen lots in the Love Heights subdivision, owned jointly with Gertrude; and the Piedmont News Stand (near the Rotary Centennial Pavilion), owned jointly with her sisters. Signing the paperwork must have given Carrie and Lena a tremendous sense of relief that their affairs were now in order, and that their goal of saving for their old age would in time coalesce into a noble charitable purpose.

Being private about their finances, neither Carrie nor Lena informed family members about their charitable foundation or their individual trusts. The new trustees of the Carrie E. and Lena V. Glenn Foundation may have

known about Carrie and Lena's estate plans and the existence of the Carrie E. Glenn Trust and the Lena V. Glenn Trust, but they had no idea of the size of their assets.

An Endowment at the Presbyterian Home

As the women were executing their estate plans in 1971, the Presbyterian Home approached Carrie and Lena to become founding contributors to its first permanent endowment, established to provide financial assistance to residents of modest means. Perhaps buoyed from feelings of goodwill and knowing that their affairs were in order, the sisters contributed an anonymous lead gift of \$75,000. The amount of their contribution would not be known in Gastonia until 2017. The sisters' willingness to establish the endowment with such a sizeable gift shows their appreciation for those in helping professions who made lifetime financial sacrifices for careers as teachers, nurses, missionaries, and ministers.

Organizational Meeting

In late November 1971, Bob Rosebro wrote Carrie and Lena in his role as senior trust officer as he contemplated the first meeting of the board of trustees. While the trust instrument gave many possible recipients, Bob sought their input regarding spending the first income from the foundation, which totaled \$363.75.

Bob filed this letter in his office at the trust department, where it sat undiscovered until late 1984. On January 30, 1985, the trustees incorporated it as an official document of the foundation, along with the trust indenture, and for many years read it at the beginning of the annual grant deliberation process. The framed letter hangs in the Glenn Foundation's office.

On March 29, 1972, Bob Rosebro hosted the trustees at a luncheon and organizational meeting at the Elks Club, which was located in the handsome tan brick mansion at 209 West Second Avenue built by Joseph Separk, school principal, textile man, and Gaston County historian. The bank, as corporate fiduciary, had sold the low-yielding municipal bonds Carrie and Lena had tendered the previous fall, since tax-exempt bonds provided no

Presbyterian Home
High Point, N.C.
Dec. 7, 1971.

Dear Mr. Rosebro:

In answer to your letter of November 26 in regard to the spending of the income from the Foundation, we suggest that the present amount received (\$363.75) be spent for community activities (with emphasis on programs for the sick, handicapped, indigent, and elderly, of Gaston County, North Carolina). As to the future income, we prefer that the trustees spend it where it is most needed and where it will do the most good. If, as Mr. Garland says, scholarship loans are frequently not paid back, we prefer that no such loans be made unless secured, and that grants and loans should be made only to persons who will serve humanity after they get their education—such as doctors, nurses, ministers, etc. In that way, the money would benefit more people than just the recipient.

These are our suggestions. You may think of something better.

Sincerely yours,
Lena Glenn
Carrie Glenn

Lena and Carrie Glenn sent this letter of December 7, 1971, to trust officer Robert N. Rosebro of the Citizens National Bank with their suggestions for spending the first income from the trust. Courtesy of the Glenn Foundation archives.

benefit inside a charitable foundation. The bank planned to invest the proceeds in its common-trust fixed-income fund, a proprietary mutual fund, at the next entry date in May. Although the value of assets dropped to about \$20,000 following the sale of the bonds, due to market forces, the bank expected income of about \$1,200 a year once the funds were reinvested.

Bob closed his invitation: “You will find this to be a very interesting and challenging experience, and particularly some time in the future, when, after the passing of the Glenn sisters, this will be a sizeable charitable organization and can be a means of aiding many worthy persons and causes.”

Such an honor. The new trustees anticipated the first meeting with curiosity and excitement, since the experience of serving on a foundation board was new to everyone but Jim Stuart. Several family foundations, corporate foundations, and private foundations had been established already in Gaston County, and the Carrie E. and Lena V. Glenn Foundation joined their ranks. While the name sounds like a family foundation, it is not.

Judy Miller was unable to attend, but the other trustees were present. To carry out the agenda, Jick Garland and George Winecoff were guests and served as temporary chairman and temporary secretary, respectively. As the first order of business, the trustees elected Hugh Bryant chairman and Judy Miller secretary. The two proved to be exceptionally dedicated volunteer leaders, conscientious, thorough, and attentive to detail. Each willingly devoted many hours to the success of the new charity, serving far longer than either expected. With very few exceptions, they preserved a complete record of activities from the foundation’s earliest days.

Provisions of the Trust Indenture

The trust indenture set the foundation’s fiscal-year close as September 30. To avoid a tax penalty, trustees were required to spend 5 percent of assets annually, known as the minimum distribution. It was an essential number to know before every grant cycle. The minimum distribution equaled 5 percent of the five-year rolling average of the portfolio, less overhead expenses. Tax penalties ensued if the distribution was not met. The trustees agreed to hold a meeting at noon on the second Tuesday in September each year, beginning in the year 1973, to be sure they made a distribution before the fiscal-year close.

Jick reviewed the major provisions of the trust indenture, beginning with the objects and purposes of the foundation:

- 1) To make contributions to any church, hospital, school, library, community chest fund, or foundation.
- 2) To award scholarships or loans for study at a college or university to worthy persons.
- 3) To make contributions for such other religious, charitable, scientific, literary, or educational objects and purposes as agreed to by the trustees.

Further, it was *recommended, but not required* (emphasis added) by the donors, to grant:

- 25 percent of assets to religious organizations, including First Presbyterian Church of Gastonia, for church music, education, and suffering indigent persons; Presbyterian Home of High Point to add to an endowment for assisting residents in financial need; the Presbyterian Foundation Inc. for foreign missions including medical and educational opportunities in underdeveloped countries;
- 25 percent of assets to educational organizations including the University of North Carolina in Greensboro (the Normal) for scholarships and loans; St. Andrews College (a Presbyterian College founded in 1961 in Laurinburg, North Carolina) for scholarships and loans and to secure and compensate outstanding members of the faculty; Gaston College in Dallas, North Carolina, for scholarships and loans and to equip the library; St. Catherine's School in Richmond, Virginia, for construction of school facilities; and Union Theological Seminary in Richmond, Virginia, for scholarships and loans and to equip and maintain an adequate theological library;
- 25 percent to medical organizations including Gaston County Hospital for equipment, aid to indigent patients, and scholarships or loans to nurses in training; and the University of North Carolina at Chapel Hill, Duke University, and Wake Forest University for medical research and scholarships and loans; and,
- 25 percent to community organizations (with emphasis on programs for the sick, handicapped, indigent, and elderly); Gaston

County Public Library for books, films, recordings, purchases, and expansion of library facilities; Gaston County Community Fund for worthwhile community projects; and United Community Services of Gaston County (predecessor of United Way of Gaston County) for support of community and national service organizations.

It should be noted that Jick, not the Glenn sisters, developed the specific list of organizations. Although Carrie and Lena approved the document without comment, the named organizations did not have preferred status, since funding them was “recommended, but not required.”

The balance of Jick’s review dealt with the role of the trustees and their administrative responsibilities, such as keeping meeting minutes, signing checks, and distributing income and/or principal annually, as they deemed advisable. Carrie and Lena were to appoint successors to the original trustees, and after their deaths, the trustees would appoint new members. Trustees could resign with a thirty-day notice or be terminated for missing four consecutive meetings. They could also be compensated for their service. As a board, trustees had the power to terminate the foundation and distribute its assets to any religious or tax-exempt charitable organization.

The trust department received the letter of tax exemption from the IRS on April 24, 1972, coincidentally Carrie’s 88th birthday. It classified the Carrie E. and Lena V. Glenn Foundation as a private foundation, and distributions from the foundation and donations to it became tax-deductible.

Inaugural Grants: 1972

The trustees had decided to wait until fall before making decisions on grants. When they met again on September 12, 1972, \$986.12 was available for distribution to tax-exempt institutions and government entities. But the trustees had not thought collectively about possible recipients since their March meeting. There was no application form, and so Hugh assigned trustees to investigate community needs in the four areas outlined in the trust indenture: Jim Stuart to seek out needs of religious organizations; Bob Rosebro to investigate educational institutions, particularly Gaston College; Charlie Glenn to look for medical organizations; and Judy Miller to handle community activities, particularly the new Meals on Wheels

program operating out of Holy Trinity Lutheran Church. Charlie Glenn was unable to attend this meeting, and so Hugh Bryant wrote and asked him to “keep his eyes and ears open” for granting opportunities for medical research, scholarships, and loans. The trustees agreed to report on their findings after the start of the new fiscal year beginning October 1.

The board met on October 17 for the final time in 1972. Jick was present again as an advisor. Bob’s one-year term had expired, and the board elected him to a full term of three years, with Carrie and Lena’s approval. Charlie was absent again and so the trustees did not consider medical needs, and Judy’s investigation into Meals on Wheels showed it was a fully funded three-month pilot project.

Without fanfare, the board unanimously approved three inaugural grants totaling \$925. The largest grant, for \$500, went toward a \$75,000 building campaign for the Community Day Care Center that would serve up to seventy-five children of working mothers in the Highland community, west of US Highway 321. Myrtle Hoffman was the director. The project was close to Jim Stuart’s heart and championed by Fanny (Mrs. Branson) Zeigler, a member of First Presbyterian Church, who served as treasurer of the building campaign.

The second grant, for \$300, went to Gaston College for a student scholarship, important to the college, then eight years old. The third grant, for \$125, went to the Gaston County Public Library, on Second Avenue, for a listening station (a record player and earphones). Jick suggested that recipients send letters of appreciation directly to Carrie and Lena in High Point, so Hugh included that suggestion in his notification letters. The sisters must have taken pleasure in reading these acknowledgments and learning how the initial contributions from the foundation benefited their home community.

Because of their experience in the first year, the trustees agreed to convene one month prior to their scheduled meeting in September 1973 to explore their assigned areas and seek out specific community needs. The first granting year of the Carrie E. and Lena V. Glenn Foundation was now in the books.

CHAPTER 2

Where Needed Most

1972–1979

For the next seven years, the board met annually in September to make distributions, with additional meetings occurring occasionally. The trust department filed the foundation's annual tax return, a 1 percent or 2 percent excise tax on net investments depending on qualifying expenditures. For the Glenn Foundation, it was a whopping \$18.67 in 1972. At the end of every fiscal year, the trust department provided an annual financial accounting of receipts and disbursements, along with a letter notifying Hugh, as chairman, of the minimum distribution available to grant the following year. After the board finalized grant decisions, Hugh informed the trust department of the names of the recipients and grant amounts, the trust department wrote checks and sent them to Hugh, and he wrote notification letters and enclosed the checks.

An Extraordinary Letter

Before the board convened in 1973, trustee Jim Stuart called on the sisters in High Point and met them for the first time. They found the visit pleasing, for they sent Jim a wonderfully informative and instructive letter that hangs in the foundation's conference room. Handwritten by Lena because of Carrie's blindness, it is worth repeating here in part. Lena, now 87, signed both names.

Presbyterian Home
High Point, N.C. 27261
March 28, 1973

Dear Mr. Stuart,

. . . Our father was for many years an elder in the Presbyterian Church until his death in 1911. He had a large family, and we were brought up to work and save and spend only what was necessary; for one never knows what his future needs might be. He never accumulated much money but spent most that he had trying to educate his children. He said that if he left them money or property, somebody could take it from them, or they could run through it themselves and have nothing; but if he gave them an education, nobody could take that and with the education they should be able to take care of themselves. He sent all ten of them to college. One died at college in his sophomore year, but the others all finished and all did take care of themselves.

We three at the Presbyterian Home are the only ones left now. All of us worked and saved enough to pay our own expenses at the Home for as long as we think we will be here. We did without many things that we might have had, but it has given us a lot of satisfaction to know that we could and did take care of ourselves without asking anyone for help. Our sole purpose in making this foundation was to try to have any money that we might leave go where it is needed most and will do the most good.

Many worthy causes are listed in the foundation as possible recipients, some of them more worthy than others, or their need more urgent, as in relieving human suffering. We have been told that scholarship loans, more often than not, are never repaid. A student who gets his education that way and then makes no effort to repay the loan or render any service to humanity, such as doctors or nurses, is dishonest and does not deserve help. Of course there are many honest students who do deserve help.

We realize that the selection of recipients and the disbursement of funds are in the hands of your committee. We simply want the money used where it is needed most and will do the most good. We feel sure

that the members of your committee will do their best to see that this is done.

We wish to thank all of you for your efforts in this direction.

Sincerely yours,
Carrie and Lena Glenn

In 2000, the board substituted this letter for the one the sisters wrote in 1971, and someone reads it aloud at the start of each grant-deliberation process. It reminds the board of the sisters' humble background, their personal sacrifices, the value their family placed on education, and their wishes that money go "where it is needed most and will do the most good."

Grant Distributions: 1973–1975

In August 1973, the board allocated \$346.75 to the same recipients as the previous fall in order to expend the minimum distribution of \$1,271.75 before September 30, 1973. In 1974, the trustees awarded the entire allocation of \$1,011.98 to Holy Trinity Lutheran Church for Meals on Wheels, now an ongoing endeavor. In 1975, they granted the entire distribution of \$1,151.42 to the Community Day Care Center building fund.

In 1975, Bob Rosebro retired from the bank after a forty-two-year career, and with his retirement came his resignation as a trustee at the board meeting. The board appointed Bob's successor in the trust department, H. William Palmer, to fill the unexpired term. Bill Palmer was a graduate of the University of North Carolina at Chapel Hill and of its law school, and served in the US Navy for three years after graduation. In his new position as trust officer, Bill had already visited the sisters in High Point, where he found Carrie bedridden in the nursing unit.

Charlie Glenn had also resigned, for he had retired and joined his wife in Alexandria, Virginia, where she was now a medical advisor to the State Department. Charlie's resignation not only created a vacancy, but it also meant that no one from the Glenn family served on the incumbent board. Dr. Charlie's service as a founding trustee did not create a precedent for board service by a Glenn family member, however. The trust indenture set the precedent when it did not specify that a member of the family serve.

The board has always been concerned that the nomination of a family member would confuse the established culture and tradition of the Glenn Foundation as a private foundation.

After the meeting, Hugh wrote a newsy two-page letter to the sisters, telling them of the changes to the board and about the Community Day Care Center grant. He also let them know that the county was planning to build a new main branch for the public library, and that the board hoped to provide funding for some aspect of the new facility.

Hugh closed his letter by writing, "Thank you for what you have done for our community and you may be assured that we will continue to disburse the funds from the foundation on a conservative and needy basis. Thank you for the privilege of serving you." He also enclosed an approval form for the Day Care Center grant. Gertrude signed Carrie's name at Carrie's request.

In her reply, Lena thanked Hugh for his news and approved the appointment of Bill Palmer, but wrote, "We are very sorry indeed that Mr. Rosebro is no longer with the bank and with the committee, but since he is not, we are very glad to know that Mr. Palmer has been chosen to replace him. Our best wishes to all of you." The news of Bob's retirement had to be unsettling for both sisters. Although they had met Jim Stuart and Bill Palmer, they now had little personal knowledge of the others serving on their "committee," as they called it. They would need to rely on the integrity of the board of trustees to carry out the provisions of the trust indenture and guide their foundation into the future.

Grant Distributions: 1976, 1977

The trustees recommended that Dr. Walter Watt "Dub" Dickson fill Charlie Glenn's unexpired term. Dub was a local veterinarian, a leader at First Presbyterian Church, and a partner in Hughey-Dickson Animal Clinic in Gastonia, having received his DVM from the University of Georgia. Dub was well known in the community and would serve ten years as a Republican member of the North Carolina House of Representatives representing District 44.

With \$1,151.28 to disburse in 1976, the board granted \$1,000 to Queens College, a Presbyterian-founded college in Charlotte, for a scholarship

designated for a Gaston County student. The balance of the funds, \$151.28, went to the Community Day Care Center, which was now operating out of its new building and with a new name, the Myrtle B. Hoffman Day Care Center. Fanny Zeigler thanked the board for its financial assistance but especially for the trustees' continued interest in the building project.

The year 1977 brought two changes since the meeting the year before. First, Bill Palmer had joined the law firm of Stott Hollowell, in Gastonia, and Charles L. Myers, new to the trust department and the community, succeeded Bill as trustee. Charlie Myers was a Wake Forest graduate, and like Bill Palmer before him, had already met Carrie and Lena. Second, the Citizens National Bank acquired Union Trust Bank in Shelby and changed its name to Independence National Bank. The merger and new name did not affect the service the trust department provided to the sisters and to the foundation.

The new Gaston County Public Library building was completed by 1977, and the board granted \$750 for a display cabinet, stipulating that a plaque recognize the donors. It was the first time the board requested recognition for any contribution. The board granted remaining funds, \$528.50, to Cooperative Christian Ministry of Greater Gastonia, a new organization founded by Gastonia churches. The foundation's small contribution was part of \$9,992 the agency raised its first year to provide emergency assistance for rent, deposits, utilities, food, and medicine to 894 needy households.

Activation of the Carrie E. Glenn Trust

Carrie most likely lived the last two years of her life in the nursing unit at the Presbyterian Home. Her trust continued to pay the monthly fee, which had grown to \$375 in 1977. Her expenses were offset by a monthly deposit of \$305 from the State of North Carolina Retirement Fund for her years of teaching, \$30 per month for her share of rent from the Piedmont News Stand, and her trust earnings. While there were other occasional distributions, the small demands on her trust meant her assets kept increasing.

On October 29, 1977, Carrie Eugenia Glenn died in High Point at the age of 93. Earlier that year, as her health had declined, her trust had paid for modest medical expenses and prescriptions. Her body was returned to Gastonia, where her funeral was held on October 31 at McLean and Son

Funeral Home, on Broad Street, followed by a graveside service in the afternoon at the family's burial plot at Oakwood Cemetery. Since Rev. Stuart was unavailable, the Rev. Peter Carruthers, a young associate minister for youth at First Presbyterian Church, officiated.

Independence National Bank served as the executor of Carrie's estate and as trustee of the *inter vivos*, now testamentary, Carrie E. Glenn Trust. Her last will and testament was probated on November 11, 1977, and the estate planning Carrie had done earlier in the decade went into effect. The bank established an administrative savings account of \$20,000 to handle estate expenses. J. David Wright Jr., a young trust officer who succeeded George Winecoff, was dispatched to High Point to help close up Carrie's room. He retrieved a cameo stickpin, and maintenance workers discovered Carrie's 1959 diary. David returned the pin to the bank, and the workers turned Carrie's diary over to the home's executive director, Betty Hayes, who placed it in the office safe.

A month after Carrie's death, Hugh Bryant learned of the existence of the Carrie E. Glenn Trust when Charlie Myers wrote him on November 29, 1977. Hugh forwarded Charlie's letter to the trustees. Of Carrie's trust, he wrote:

This trust provided that during her lifetime she would receive all the income and any of the principal of the trust that she so desired or needed. However, upon her death the trust is to continue for the benefit of both Miss Lena and Miss Gertrude. Upon the death of the last of the sisters to survive, the trust will terminate and pay the proceeds over to the foundation. This will result in a sizable increase in the assets of the foundation. Therefore, since the foundation is the ultimate beneficiary of the trust, we, as trustee, feel that the foundation should be kept informed as to the activities and transactions of the trust. Therefore, beginning with the next annual accounting of the trust, we will forward a copy to the trustees for review.

Because of Charlie's decision, records of the Carrie E. Glenn Trust are preserved at the foundation's office today. These records help explain how Carrie's trust eventually grew to well over \$1 million.

Family Inquiries

Since no bequests to family members were made at the time of Carrie's death, it was natural that her relatives made inquiries. Charlie Myers and senior trust officer Hugh McArver met with several of them more than once. With good reason, the family believed that Carrie and Lena had significant assets because of their brother Will's financial advice, although they could not have imagined how much. Charlie Myers likely told them in general terms about Carrie's estate and let them know that her trust would provide nothing to the family until the deaths of Lena and Gertrude.

Two months after Carrie's death, the trust department provided the first annual accounting of the Carrie E. Glenn Trust, dated December 30, 1977. As the trustees examined the information, they had to have marveled. The market value of Carrie's assets was a stunning \$655,838 on a cost basis of \$353,048. Carrie accumulated wealth through inheritance, by living frugally, and by steadily saving and investing throughout her long life.

After Carrie placed her assets in trust with the Citizens National Bank in 1961, stocks and other assets grew. While the trustees had no idea of Lena's assets, seeing Carrie's on paper helped them comprehend how their responsibilities would escalate when the foundation began distributing income left by both sisters.

At the January 1978 meeting, Charlie Myers advised the trustees to prepare for the day when the foundation would emerge from the umbrella of the bank's trust department, and they would be squarely responsible for managing the investments of a free-standing foundation. This realization instilled in the trustees even deeper feelings of obligation to grant funds in ways that honored the donors and their sacrifices. With Lena now 92 and Gertrude 89, that day seemed not far into the future.

Grant Distributions: 1978

The foundation was now listed in grant publications, and the board began to receive requests from around North Carolina and across the country. With only \$963 to distribute in 1978, however, trustees granted \$447.20 to the Gaston County Art & History Museum (Gaston County Museum of Art & History) for a slide projector, and \$515.80 to the Gaston County Office on

Aging for needs of senior citizens. The museum, the county's Bicentennial project, was established in 1975 by co-founders Jeanne Rauch, local artist and philanthropist, and Lucy Penegar, chairman of the Gaston County Historic Preservation Commission. It opened on the second floor of the historic white courthouse on the Dallas, North Carolina, square.

The Petition

Trustees no doubt were inquisitive when the bank called a special board meeting on January 2, 1979. Independence National Bank, as the executor of Carrie's will and trustee of the Carrie E. Glenn Trust, had filed a petition in Superior Court four days earlier in a friendly proceeding. New rules interpreting the 1969 Tax Reform Act provided that charitable deductions would not be allowed to offset death taxes unless gifts were in the form of a guaranteed annuity interest, a unitrust interest, or a pooled-income fund. The petition was needed to amend the wording of Carrie's trust so that contributions from her estate to the foundation would qualify for an estate tax charitable deduction, clearly the intent when she established the indentured trust.

To explain, Jick attended the meeting with his law partner and tax expert Joseph B. Alala, CPA. Also present were attorney and trust officer G. Sefton Stevens, representing the bank, and former trustee Bill Palmer, of Stott Hollowell, representing the foundation. Jick and Joe explained that the petition would amend several sections of Carrie's trust by dividing her assets into two separate trusts, as before, but stated differently to meet the provisions of the new law. The amended document divided the Carrie E. Glenn Trust into a specific legacy trust and a charitable remainder unitrust, separately administered, and similar to the earlier trust, as follows:

- The specific legacy trust of \$61,132.38, the same amount as the earlier trust, was established to benefit Lena and Gertrude, with net income payable to them in quarterly installments for the rest of their lives. When both died, \$16,132.38 of the total was to be divided among Will's four daughters "because of and in appreciation of the financial help and services rendered to the GRANTOR during her lifetime

by W. W. Glenn.” The balance of \$45,000 was to be divided equally among eight nieces and nephews and one great-nephew.

- The charitable remainder unitrust held the rest of Carrie’s assets, and its provisions remained unchanged.

When the board convened in August 1979, the petition for the Carrie E. Glenn Trust had been signed by a Superior Court judge and approved by the Internal Revenue Service. Carrie’s estate was being audited, and when it settled, its provisions would be carried out. Lena’s trust would have been similarly amended, but without court action since she was living.

The First Eight Years

At the August 1979 meeting, the board approved a distribution of \$200 to St. Catherine’s School, in Richmond, Virginia, an entity named in the trust indenture, and \$1,011 to Covenant Village, a nonprofit retirement community in Gastonia initiated by Jim Stuart to provide a continuum of care for its older residents. Incorporated in 1977, Covenant Village was in the fund-raising stage and would open in 1982. Covenant Village was the basis for Jim Stuart’s dissertation at McCormick Theological Seminary in Chicago where he received a doctor of ministry degree.

Judy had taken meeting minutes since 1973, which limited her participation in the discussion, and so Jim offered the secretarial services of his staff to help. Over the next decade, Justus Cathey, Phyllis Ballard, and Linda Dixon assisted with administrative functions and minute-taking. Judy always prepared the final version of the minutes.

From 1972 to 1979, the only changes in board composition occurred when Charlie Glenn resigned and trust officers left the bank. Although the trustees had three-year rotating terms, the board did not observe term limits, and so Hugh, Judy, Jim, and Dub served continuously. A nonprofit board that does not rotate members does not exemplify best management practices, but in the foundation’s early years, when the assets were so small, continuity provided stability. The four trustees were intelligent, compatible, connected, and forward-thinking individuals, and they embraced a common vision for the foundation. Their faithfulness, cohesiveness, and

camaraderie would serve them well when they would administer a fully funded organization.

In the eight years the foundation had been active, the trustees distributed sixteen grants totaling \$8,039 to ten organizations, most of them located in Gaston County. They had based their decisions on meeting needs, not on the percentages of the four categories outlined in the trust indenture. Most of the grants fell in the community category, and none in the medical category; however, the percentages were recommended, not required. The board had dealt with the Glenn family respectfully and had seen unexpected legal issues with Carrie's trust resolved satisfactorily. Soon, the trust department would begin dispensing funds to Lena and Gertrude's trusts.

CHAPTER 3

A Sizeable Charitable Organization

1980–1985

Since 1974, the board had held its meetings in the session room of First Presbyterian Church. The April 1980 minutes made the first reference to opening a meeting with prayer, as the trustees prayed for wisdom in carrying out their responsibilities in the new decade. Meetings have opened with prayer ever since.

By the fall of 1980, three years after her death, Carrie's estate was settled and closed. The trust department had already distributed \$30,438 each to Lena and Gertrude's trusts, the amounts higher than subsequent ones because of delays caused by the petition. In addition, their trusts benefited from several life insurance policies that Carrie left to them, although the amounts are unknown. After the initial distribution, their trusts each began receiving between \$23,000 and \$25,000 annually. Since the two surviving sisters had so few expenses at the Presbyterian Home, their assets increased, with the majority of Lena's assets ultimately benefiting the foundation, and Gertrude's benefiting her heirs.

Grant Distributions: 1980, 1981, 1982

In 1980, the board disbursed a partial allocation of \$520 to the Gaston County Department of Social Services to send ten children to Camp Morrow near Henderson, North Carolina. In 1981, with an increased allocation of \$2,408.08, including funds unspent from 1980, the board disbursed \$500 to First Presbyterian Church to purchase new hymnals for the chapel. A

bookplate inserted in each hymnal recognized the donation of the Carrie E. and Lena V. Glenn Foundation. The balance of the distribution of \$1,908.08, also paid to First Presbyterian Church, supported the education of Dr. John C. Shaw, an orthopedic surgeon and medical missionary to Korea under the sponsorship of the Presbyterian Church (U.S.A.). Shaw was enrolled in a rehabilitation residency program in Louisville, Kentucky, and the training helped qualify him to lead a similar program when he returned to Korea the following year.

By the time the board met in July 1981, Branch Banking & Trust Company (BB&T/Truist) had bought Independence National Bank, and Charlie Myers had left to take a job with North Carolina National Bank (NCNB) in Charlotte. Trust officer and attorney Sefton Stevens, who was already familiar with the foundation, succeeded Charlie. Sefton was a graduate of Davidson College and the University of North Carolina School of Law.

At the September 29, 1982, annual meeting, Jim reported that he had called on Lena and Gertrude in High Point to familiarize them with how grant funds were being used and to express his personal gratitude to Lena, now 96, for establishing the foundation. While Lena did not write after this visit, the sisters were undoubtedly grateful for his thoughtful attention.

The trustees granted the entire 1982 allotment of \$1,346.23 to Crisis Assistance Ministry of Christians & Jews of Greater Gastonia Inc., or Crisis Assistance Ministry, the new name given to Cooperative Christian Ministry when Temple Emmanuel became a partner congregation. Crisis Assistance Ministry was moving from its office on Main Street to a new location at 315 East Third Avenue. The trustees gave Crisis Assistance Ministry's board discretion to use grant funds where most needed, either for the move or for clients' emergency needs.

Payoffs from Local Investments

In his update to the trustees in 1982, Sefton Stevens reported that Carrie's trust was valued at \$800,000 and Lena's at \$850,000. In the four years since Carrie's death, her assets had declined, and Lena and Gertrude's had increased because of annual contributions from Carrie's trust. By this time, Carrie's trust had begun benefiting from appreciation in long-held stocks in three Gaston County companies, each with a cost basis of under

\$4,000: Textiles-Incorporated, Wix Corporation, and Parkdale Mills. In 1978, the year after Carrie's death, Textiles-Incorporated changed its name to Ti-Caro Inc. when it was listed on the New York Stock Exchange. By the mid-1980s, the value of Carrie's Ti-Caro stock grew to \$90,000 and would go higher. In 1979, when Dana Corporation purchased Wix Corporation, the value of her stock rose to \$239,012. By far, the biggest gain came when Parkdale Mills privatized in 1982. Carrie's 272 shares of stock were tendered to Parkdale at \$1,200 a share, earning her trust \$326,400. The appreciation from these three companies almost doubled her assets, pushing her trust to well over \$1 million.

Between annual meetings in 1982 and 1983, Sefton Stevens left the bank to take a position with NCNB. David Wright replaced him at the September 1983 meeting, the fifth trust officer to serve on the board since inception. A member of First Baptist Church in Gastonia, David graduated from Gardner-Webb College and began working at the Citizens National Bank in 1974. He joined the trust department in 1976. David had already met the sisters when he began his service on the board. He would enjoy a career of over forty years with BB&T, and brought stability to the trust officer's position.

Grant Distributions: 1983, 1984, 1985

In 1983, the board made its first distribution in the medical area with a \$500 grant for equipment for the new Gaston County Cardiac Rehabilitation Foundation (HealthPlus of Gastonia) program to benefit citizens with heart disease. It was located at the Gaston County YMCA on Franklin Boulevard. The board granted the balance, \$701, to Crisis Assistance Ministry for client utility bills, expending fully the \$1,201 available to distribute.

The trustees learned at this meeting that Lena was in declining health. Because the prospect of a fully funded foundation seemed closer, Judy suggested increasing the size of the board from five to seven trustees, which was allowed by the trust indenture. Jick had also been thinking ahead and drafted a set of bylaws for the board's consideration. Until now, the trustees had been guided only by the trust indenture. The board adopted the bylaws informally, except for the provision on term limits, and decided to consider board expansion and term limits after the death of the last sister.

By now, the trustees had begun asking potential recipients to submit requests for the application form by letter several weeks before the date they met, and had already received nine. At the January 1984 meeting, with only \$523.34 to distribute, the board again granted \$500 to the Cardiac Rehabilitation Foundation.

Sensing that the first phase of the foundation was winding down, Hugh suggested that the board seek a written history of the foundation, by which he meant a history of the Glenn family. When Fred Ratchford, newly retired Chamber of Commerce executive, was unable to take on this project, Geraldine Hagan Johnston, an English teacher at Hunter Huss High School, completed a concise history based on excerpts from Lon Glenn's genealogy, which the sisters' niece Susan Love Glenn provided. It was reprinted in the foundation's 2015–2016 Annual Report.

The Last Sisters to Die

On January 25, 1984, Lena Viola Glenn died in High Point. Two days later, Rev. Dr. Jim Stuart presided over her graveside service at Oakwood Cemetery. If Lena's trust had investments comparable to Carrie's, including Parkdale Mills, Textiles-Incorporated, and Wix Corporation, she died a millionaire.

"Best Wishes for a Happy 1985," Hugh Bryant wrote to announce the annual meeting, on January 30. The board granted the entire distribution of \$825.91 to Crisis Assistance Ministry. At this meeting, Judy noted that she and Hugh had served as officers for thirteen consecutive years and thought others should serve for the health of the foundation. Her observation fell on deaf ears, and their service continued as before.

On July 17, 1985, May Gertrude Glenn died at the age of 96. Jim Stuart conducted her graveside service at Oakwood Cemetery on July 19. She was the last of her accomplished siblings to depart this earth.

The three sisters lived unusually long lives, Carrie to 93, Lena to 97, and Gertrude to 96. The late Alex Hall, trustee, director, and board chairman, once playfully remarked that the women lived such long lives because they had no husbands to irritate them.



L. to r.: The headstones of May Gertrude, Lena Viola, and Carrie Eugenia Glenn in the Glenn family coping at Oakwood Cemetery, on Franklin Boulevard in Gastonia. Courtesy of the Glenn Foundation archives.

A Spectacular Legacy: \$3 Million

After Gertrude's death, the trust department at BB&T began implementing the provisions of Carrie and Lena's individual trusts, paying out the specific legacy portions to family members from Lena's trust and paying Gertrude's bequests according to her will. Family members received far more from Gertrude's estate thanks to contributions from Carrie and Lena's trusts.

The trust department withheld funds to cover unforeseen estate expenses and transferred assets from Carrie and Lena's trusts to the foundation. When these actions were completed, the estate administrative account had a balance of \$17,371, Carrie's unitrust was valued at \$1,527,955, and Lena's unitrust at \$1,393,795, increasing the corpus of the Glenn Foundation to \$2,939,121, excluding their real estate investments. It was a surprising, spectacular legacy.

The relatives were shocked when they learned of the value of Carrie and Lena's estates, and felt sad that the two sisters had not allowed themselves to enjoy more of the comforts of life when they could have well afforded them. The bequests hardly compared to what the relatives could have inherited

had Carrie and Lena left them their entire estates. And yet it is unlikely that the two sisters planned to leave their savings to family. Their frugality was as deeply rooted as their father's admonition not to leave money or property to heirs where "somebody could take it from them, or they could run through it themselves and have nothing." Although tax savings inspired the creation of the Carrie E. and Lena V. Glenn Foundation, the sisters derived much pleasure from knowing that their lives of sacrifice would benefit others after their deaths, primarily through the charitable organizations in the county where their family had such deep roots.

In November 1985, the trustees began planning for the administration of a fully funded, much larger foundation. During a board retreat, they decided to hold quarterly planning meetings in 1986, to enlarge the board to seven by electing two new trustees in November or December 1986, and to distribute grants only from income, leaving the principal intact. Further, they agreed to ask past recipients to submit written requests by December 15, 1985, having decided to distribute roughly \$1,000 in grants at the January 1986 meeting. That would allow them to focus on preparing to distribute funds from the larger corpus during the rest of the year.

CHAPTER 4

A Year of Preparation

1986

In January 1986, the trustees approved the bylaws, including the provision on board rotation. Over Judy's objection, and beginning that April, they approved compensating themselves for each full meeting attended, the board's only contested vote up to that time. They also agreed to add two additional trustees immediately rather than wait until later in the year.

To determine terms of trustees for an expanded board, each trustee drew a number representing a one-, two-, or three-year term beginning anew in 1987. Judy, Hugh, and David drew three-year terms, Jim a two-year term, and Dub a one-year term, meaning that one new trustee would serve a two-year term with Jim, and the other a one-year term with Dub. The board reelected Hugh and Judy to their respective offices by acclamation and then, deciding that there should be a full complement of officers coming from existing trustees, elected Jim Stuart the vice chairman and David Wright the treasurer.

Each trustee submitted five names for consideration and by secret ballot voted for two. They elected Craig M. Fielding and Elizabeth Triplett "Trip" Stewart, both members of First Presbyterian Church. Craig was a graduate of the University of Nebraska and a Vietnam veteran. He was a stockbroker with Interstate Johnson Lane but spent most of his career as a financial planner. He served on the boards of Covenant Village and Gaston Hospice.

Trip was a native of Lenoir who moved to Gastonia in 1962 after her marriage. She was a community volunteer, had served as treasurer and

president of the Junior League of Gaston County, was involved with the Pioneer Council Girl Scouts, and at the time she joined the board was serving as president of the Gaston County Cancer Society.

With only \$1,177 to disburse in 1986, the board granted \$500 to Crisis Assistance Ministry for client assistance, \$500 to the Gastonia Adult Day Care Center, opened by the Gaston County Department of Social Services in 1984, and \$177 to the Gaston County Public Library, to be used where it was needed most, to do the most good.

Learning from the Mary Reynolds Babcock Foundation

The trustees had spoken about visiting another foundation to learn more about operating one, but instead arranged for William Bondurant, executive director of the Mary Reynolds Babcock Foundation, in Winston-Salem, to meet with them. It was one of the board's most beneficial decisions. Bill Bondurant, who held an undergraduate degree from Davidson College and a law degree from Duke University, had considerable experience in foundation work. In February 1986, Craig Fielding and Trip Stewart attended his presentation in the Session Room of First Presbyterian.

Bondurant provided an enlightening orientation:

- Do not make the grant process complicated. Giving money to worthy causes provides great pleasure and satisfaction. The grant process should be enjoyable.
- Granting decisions should never become a tradeoff, i.e., "If you vote for my pet project, I'll vote for yours."
- Avoid proactive solicitation of applications; simply judge the applications received. Grant recipients do better carrying out their own ideas and programs.
- Solicit applications quietly the first year or the foundation will be inundated with requests.
- Publicize grant decisions when the process is over. The public needs to know how the foundation helped the community.
- Take time before hiring administrative staff to see how the board manages on its own. The eventual hire, probably a part-time person, will make the grant process smoother.

- Develop committees, particularly an investment committee, since investment decisions will become a duty of the board.

In addition, Bondurant shared the Babcock Foundation's application form, which became the prototype for the Glenn Foundation's application for many years. He advised including instructions and the size and number of grants made each year to provide guidance to applicants. After receiving the applications, Bondurant would write a short summary of each request for his board and make site visits to all agencies being considered. He also required recipients to submit a report six months after grants were made. The trustees were already familiar with the requirement to distribute a minimum of 5 percent of assets annually, but Bondurant elaborated further. Administrative overhead expenses and grants were removed from the calculation, but also excise taxes, foreign taxes, depreciation, and fund manager fees. If assets grew more than 5 percent, the Babcock Foundation granted more than the 5 percent to help address community needs.

Finally, Bondurant suggested that the board investigate membership in the Southeastern Council of Foundations (Philanthropy Southeast), which represented eleven Southern states and sponsored a three-day conference each year. Spending a small amount to educate the trustees and provide exposure to broader viewpoints would be beneficial. Bondurant then answered questions and addressed matters the trustees had not considered. After his presentation, the board seated Craig and Trip, who drew straws to determine the length of their terms. Trip joined Jim Stuart for a two-year term, and Craig joined Dub Dickson for a one-year term.

Seven Trustees

At the annual meeting in March 1986, seven trustees conducted the foundation's business for the first time. Carrie and Lena's combined assets were now valued at \$3.598 million. David Wright presented the board with the cameo stickpin, a forgotten part of Carrie's estate, and the trustees agreed that it should go to Sarah Glenn Boyd, Will's eldest daughter, and let the family decide the new owner. The board authorized David to dispose of all the sisters' real estate for the best price he could get. With cash on hand of \$220,374, the board placed \$150,000 in a nine-month investment to save

for 1987 grant payments and placed remaining funds in a more permanent investment with the trust department.

Hugh established three committees—administration, finance, and goals and applications—and assigned trustees to each. He charged them to develop job descriptions and duties. The board purchased a filing cabinet to hold important papers in a single location and accepted Jim’s offer to keep it in his secretary’s office.

Committees of the Board

By the April 1986 meeting, committees met and reported to the board. The administrative committee’s main responsibility was keeping records. It recommended that the minister’s secretary be engaged for a small stipend to maintain the files, record minutes of the board meetings, and keep up with the grant application process. The finance committee defined its responsibilities as formulating and presenting an annual administrative budget and monitoring it through the year, monitoring and evaluating the performance of the foundation’s assets at BB&T, and providing guidance to fund managers.

Trip and Judy were assigned to the goals and applications committee, and they faced the immediate task of creating an application form and related materials to publicize the increase in assets. For the printed material, Trip and Judy defined the purpose of the foundation: “to provide annual grants to tax-exempt institutions or programs which are organized and operated exclusively for religious, scientific, literary, educational, or charitable purposes with the majority of grants going to benefit the people in Gaston County, North Carolina, and in the Southeast.” Since the trust indenture gave no geographic limits for grant distributions, the addition of the Southeast may have been a way to encompass St. Catherine’s School and Union Theological Seminary, both in Richmond, Virginia, and named in the trust indenture. It also may have stemmed from initial concerns that there might not be enough requests from Gaston County to expend all grant funds, thus jeopardizing the minimum distribution.

Trip and Judy developed a mock-up of the application form with instructions, keeping much of the information from the Babcock Foundation

form unchanged. After review, the board included three grantmaking policies on the form to guide applicants:

- *The foundation “ordinarily” does not provide funds for “bricks-and-mortar” projects.*

The board thought that the foundation was too small to make a contribution of any significance to a building campaign, and that giving to bricks-and-mortar projects would divert funds from more direct help to people.

- *The foundation does not provide assistance to individuals, such as scholarships.*

Carrie and Lena Glenn had expressed doubts about lending money for scholarships, and it would be time-consuming to manage individual scholarships.

- *The foundation requests a written summary of accomplishments resulting from grants, a formal accounting for the funds, and specific interim reports to be received within one month after the end of the grant period, if requested.*

This provision assured trustees that funds would be spent as intended.

The committee also developed a tentative calendar to give structure to the plan of work:

- January—Hold Annual Meeting on the third Wednesday to elect officers and trustees and review the annual financial report from the trust department.
- April 1—Deadline to receive applications; applications copied and submitted to trustees.
- April to June—Study applications and make site visits.
- June—Hold two grant deliberation meetings using the Glenn sisters’ 1971 letter and trust agreement as guidance. Make decisions, notify and pay recipients, and announce decisions in press releases to the *Gastonia Gazette* and *Charlotte Observer* after July 1.
- October or November—Meet to receive year-end reports and a report from the finance committee.

The trustees agreed that they would not publicize the amount available to grant and would not bind themselves to the percentages outlined in the trust indenture. They also agreed to consider making consecutive grants to the same recipient so long as the agency submitted an annual application.

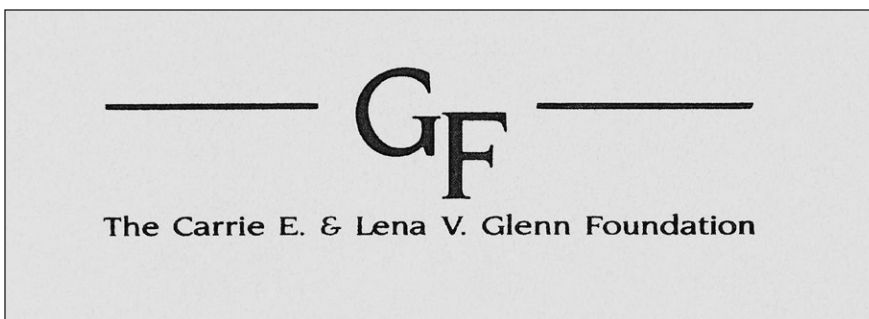
The board discussed affiliation with the Charlotte Area Donors Forum, an informal group of foundation personnel that met for lunch four times a year to hear programs of regional interest. Marilyn Bradbury of the Foundation for the Carolinas, who managed the Donors Forum, had heard about the Glenn Foundation and invited the trustees to attend an upcoming meeting free of charge. Some trustees attended but the board did not act on membership at this time.

When David Wright joined the board in 1983, he served as the bank representative, a trustee, and the treasurer. As an employee of BB&T, he did not receive compensation for his board service, but the bank wrestled with his multiple duties. Because he was uncomfortable signing checks, David resigned as treasurer, a decision the board accepted with regret. Trip Stewart succeeded him.

Financial Decisions

Since the board seemed to struggle with its authority to direct investments, Craig met with attorney C. Penn Craver Jr., of Petree Stockton & Robinson, of Charlotte and Winston-Salem, seeking a legal opinion to clarify the board's role. In late April 1986, after reviewing the trust indenture, Craver wrote that "sole investment responsibilities rest with the trustees in accordance with North Carolina Fiduciary Trust Law and Articles II and VII of the trust indenture." While BB&T was custodian of the trust funds, investment authority belonged to the trustees. "The trustees are charged with prudence and due diligence in developing an investment philosophy and policy to fulfill the charitable purposes of the trust."

Craver advised the board to interview several investment advisors, banks, and/or other financial consultants, so that trustees could make an informed decision regarding an investment program and/or investment manager. He cautioned the board not to make any long-term commitment with a fund manager, since performance needed to be considered on an



The original foundation logo from 1986 was likely designed by Ron Mahannah, of Commercial Printers, and used by the foundation until 2006. Courtesy of the Glenn Foundation archives.

annual basis. Qualities to look for in a manager or fund, he suggested, included past performance, potential management resources, and current philosophies. If the trustees were interested in securing more than one manager, they needed to consider investment fees, custodian expenses, and other compensation so that annual expenses would not unreasonably reduce the income available to charities. The trustees digested his advice.

At its August 1986 meeting, the board approved the application, brochure, and draft press release that Trip and Judy created, along with quotes for printing the application form, brochure, and letterhead and envelopes. Trip and Judy had tailored the Babcock Foundation's application form and created a brochure to provide information to potential applicants and the general public. The brochure included the foundation's purpose, a short history, information about the donors, a list of the trustees, and a list of grant recipients from inception in 1972 through 1986 under the four categories listed in the trust indenture—religion, medical, education, and community. It gave instructions on how to apply, along with reporting requirements, and stated that the foundation had made twenty-seven grants to thirteen organizations totaling \$16,333.15 between 1972 and 1986. Applicants needed to request the application in writing and could use only the application form the foundation provided. The material included the foundation's new post office box so that incoming mail would not burden First Presbyterian Church.

Ready, Set, Go

By late September 1986, the materials were printed and the press release ready. The trustees were apprehensive about whether there would be sufficient requests to expend the entire 1987 distribution amount, and so Hugh sent a cover letter and brochure to members of the Glenn family, all past recipients, and all organizations and institutions listed in the trust indenture, telling them the good news of a larger corpus. To make another group aware of the foundation's increased presence, he sent a letter, brochure, and application to leaders of prominent nonprofit organizations in the county, including Caroline Garrison, executive director of the United Way of Gaston County; Wayne F. Shovelin, president of Gaston Memorial Hospital; and George McSwain, superintendent of Gaston County Schools, as well as to twenty-five prominent leaders of business and industry. Among the recipients were Earl Tindol, Earl Tindol Ford; J. Bynum Carter, A. B. Carter Inc.; banker Plato P. "Tete" Pearson; Charles T. Stowe, Belmont Hosiery; Phil Coyle, Gaston County Chamber of Commerce; Dan and David LaFar, LaFar Industries; W. Duke Kimbrell, Parkdale Mills; Dan Gunter, Smith Textile Apron; James Cherry, Goodwill Publishers; John L. Fraley, Carolina Freight Carriers; Larry Petty, Petty Machine; Dan Howe, Pharr Yarns; and Charles E. Zeigler Sr., Public Service Company of North Carolina.

On September 26, 1986, the foundation issued the following press release:

Glenn Foundation to Become Fully Operational in 1987

The Board of Directors [trustees] of the Carrie E. and Lena V. Glenn Foundation announced today that beginning in 1987, the foundation will be fully operational. The trustees expect to begin awarding grants yearly beginning July 1, 1987.

The Carrie E. and Lena V. Glenn Foundation was established in August 30, 1971, by the two donors as a means of providing financial support for religious, scientific, literary, educational, and charitable programs or institutions. These institutions will be primarily located in Gaston County, in North Carolina, and in the Southeast.

Carrie E. and Lena V. Glenn were daughters of the late William Davis and Sarah Torrence Glenn, longtime residents of Gaston County. Carrie spent most of her life in the area of education having been both a teacher and a supervisor in the Gastonia City and Gaston County Schools. Lena also had been a teacher but spent most of her life devoted to the Gaston County Public Library. Upon the death of their late immediate family member in 1985, their estates were left to The Foundation. The Glenn Foundation has current assets of over \$3,000,000. From 1972 to 1986, a total of \$16,333.15 in grants have been awarded.

The Glenn Foundation is governed by a board of seven directors: Hugh F. Bryant, Chairman; James G. Stuart, Vice Chairman; Judith M. Miller, Secretary; Elizabeth T. Stewart, Treasurer; Walter W. Dickson; Craig M. Fielding; and J. David Wright. Grant applications and further information may be obtained by writing the Board of Directors at P.O. Box 308, Gastonia, N.C. 28053-0308.

The release was picked up by Bob Hallman, business editor of the *Gastonia Gazette* (who had written a history of Olney Presbyterian Church and would have been interested in the story), and Dave Baity, editor of the *Gastonia Neighbors* edition of the *Charlotte Observer*, and received wide exposure. Baity was a Kings Mountain native who loved the Gaston community and had a knack for writing appealing human-interest stories.

In November 1986, when the board held its final meeting of the year, the corpus was valued at \$3,651,013. The board adopted a procedure to handle applications as they arrived. Hugh reported on the Southeastern Council of Foundations conference he had attended in Virginia earlier in the month, which he found to be valuable. The board voted to pay the expenses of any trustee who wished to attend in the future, which grew to include spouses. Over time, the board limited attendance to two trustees and staff. New trustees were encouraged to attend during their first terms of office.

With their planning and hard work behind them, the trustees held their collective breaths, awaiting the response from local nonprofits to the announcement of a larger corpus. After fifteen years of modest grantmaking, an exciting new era for the Carrie E. and Lena V. Glenn Foundation was about to begin.

CHAPTER 5

The Hardest Job You Can Have

1987–1990

The January 1987 board meeting was dominated by financial decisions. The board adopted its first operating budget, established an interest-free checking account at BB&T, and hired Cherry Bekaert & Holland, the lower of two bidders, as the CPA firm to set up an accounting system, prepare Form 1099s for the trustees, and conduct an annual compilation. Jim Ratchford, a young CPA with the firm, became the foundation's advisor. He shared financial responsibilities with BB&T, since the trust department still prepared the foundation's tax return, Form 990PF (PF for private foundation). At the end of December 1986, the foundation's portfolio had increased to \$3,880,324 thanks to a hefty 17.25 percent rate of return for the year.

The finance committee had developed three priorities to guide fund managers and to evaluate BB&T's investment results: 1) to preserve the foundation's capital assets, 2) to attain a competitive return on the foundation's capital assets, and 3) to provide an annual cash flow of 5 percent to meet legal requirements for grant disbursements. Trustees agreed that once they selected fund managers, assets should be divided among three, including BB&T, with approximately \$1 million to each.

Grantmaking from a Larger Corpus

When the trustees met in April, they found deliberations an entirely different experience, and took several meetings to finalize decisions. Eighty-five agencies requested application forms and forty-three applied. While the

board had \$143,613 to distribute, far more than the \$1,177 it allocated the year before, the new requests totaled \$1,024,094.

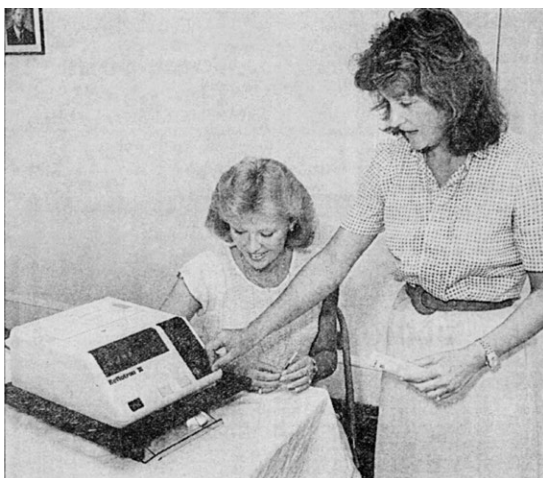
Linda Dixon, the minister's secretary, now assisted the board. She numbered each application as it arrived and kept a running list that included the date received, agency name, and name and address of the key contact person. The first page of the four-page application gave instructions, the second page asked for information about the agency, the third page asked for information about the grant program and funding anticipated or received from other sources, and the fourth page requested a program summary. Linda copied pages three and four and delivered these to the trustees in batches of six or seven applications each, following a schedule so the trustees would receive the information at least ten days before the first grant deliberation meeting.

In order to expedite discussion, trustees ranked applications from one to fifteen, with one being the most preferred and fifteen the least preferred or ineligible. They eliminated the least-preferred applications only if the vote were unanimous. Trustees eliminated twenty-four applications and sorted the remaining nineteen into the four categories outlined in the trust indenture—religion, medical, education, and community—and discussed each request. One quarter of grant funds was applied to each category, but that division was not workable if funds were to go where needed most, to do the most good. When questions arose about several proposals, Hugh assigned trustees to contact the applying agencies before the next meeting to obtain additional information.

On May 7, 1987, the board funded fifteen grants. Hugh drafted sample notification letters to recipients and non-recipients alike, which the trustees reviewed before he mailed them. Recipients had to send a written summary of accomplishments and a final accounting of funds no later than February 28, 1988.

Grant Distributions: 1987

The signature grant of \$35,000 in this new phase of the foundation's history went to the Gaston County Public Library, to computerize the card catalog at the main and branch libraries, a Herculean project costing \$190,000. The trustees proved innovative when they offered an additional \$25,000



A 1987 grant to the Heart Society of Gaston County enabled the agency to purchase a blood cholesterol analyzer to inexpensively screen individuals in the community or at the workplace. Renee Anthony (seated) and executive director Karen Segal test the device in a picture from *Gaston Neighbors*. Courtesy of the Glenn Foundation archives.

challenge grant for 1988, conditioned on the library raising matching funds from sources other than the Gaston County Board of Commissioners. The library succeeded.

A grant to Stanley Total Living Center provided nursing-assistant training. Another grant went to the Heart Society of Gaston County for a portable cholesterol-screening machine for its workplace program. The foundation received the society's 1987 W. A. Anthony Award for this gift.

Three separate grants benefitted Gaston County Schools, including \$10,000 to fund the inaugural year of a proposed Commissioners School of Excellence to educate rising public school sophomores about their county. Another \$5,000 grant was awarded for economics education, but the board paid this grant to the Gaston County Schools Instructional Supply Fund, an existing fund at the Garrison Foundation. The Garrison Foundation was fiduciary for a program headed up by local textile executive, philanthropist, and community volunteer Ralph S. Robinson Jr.

It would seem curious that one foundation would pay a grant to another foundation, but the Garrison Foundation was established as a community foundation, which was a different legal entity than a private foundation like the Glenn Foundation. The Garrison Foundation was becoming increasingly valuable not only as a charitable-giving and tax-planning tool for individuals, but also as a home for endowed funds of local nonprofits. Donated funds were pooled with the Garrison Foundation's professionally managed

portfolio, saving nonprofits from managing their investments and enabling them to share in returns generated through a larger investment pool. The Garrison Foundation would shortly change its name to the Community Foundation and reflect thirty-three different donor-advised funds under its umbrella.

“One of the Finest Charitable Foundations”

The 1987 distributions garnered praise in editorials in both the *Gastonia Gazette* and *Gaston Neighbors*. The *Gazette* stated, “The wisdom and frugality of a couple of Gastonia sisters has snowballed into one of the finest charitable foundations known in the county.” The editorial noted that the success story of the foundation “reflects vividly upon the character and upbringing that must have come to Carrie and Lena Glenn as they lived out their lives in Gaston County.” It also noted the “sound local leadership, whose interest is tied to local charitable programs and institutions.”

“It’s exciting to do this,” stated Hugh in an article by Ann Doss Helms in *Gaston Neighbors* in July, after releasing the announcement about the 1987 recipients. A *Gaston Neighbors*’ editorial declared, “This is a story of patriotism. Not the bold swashbuckling type . . . but a broader, gentler, more enduring kind that springs from a deep love of family, community and humanitarian ideals.”

Grantmaking: A Learning Experience

The trustees were pleased with the grant process and with their decisions. Over the next four years, they adapted to their increased duties and granted almost \$649,204 to seventy agencies. As they gained experience, they quickly learned that simply awarding a grant did not end their responsibilities. They monitored recipients’ follow-up reports for assurances that grant funds were being used as intended. They continued to refine grant policies, learned flexibility when grant programs could not be carried out as proposed, and discovered that disappointed applicants might challenge an unfavorable decision.

To promote better decision-making, trustees met with local leaders to enhance their knowledge of the county’s critical needs: Max Erwin, United

Way planning director; Jim Melton, director of Gaston-Lincoln-Cleveland Mental Health (Partners); and Gaston County Schools Superintendent George McSwain and his staff. They talked about attending meetings of the Gaston County Board of Education and of having more interaction with other county foundations to address common concerns. Becky Carter (Mrs. J. Bynum), the Garrison Foundation's volunteer executive director, invited representatives of the two foundations to meet together to open communication. Glenn Foundation trustees welcomed this overture, and a cordial relationship between the two foundations continues.

Return of Grant Funds

A \$5,000 award during the 1987 grant cycle went to Sacred Heart College, in Belmont, to fund an undergraduate professional and paraprofessional certification program for teachers of profoundly handicapped children. Sacred Heart was the small Catholic college for women in Belmont, North Carolina, supported by the Sisters of Mercy, also of Belmont. The proposed training was needed particularly by Holy Angels, an organization the sisters had founded in 1955 that provided residential services to children with delicate medical conditions and intellectual-developmental disabilities.

In August 1987, Sacred Heart College surprised the trustees by returning the grant. Over the summer, it had ceased operations due to low enrollment, leading to financial difficulties, and was unable to carry out the certification program. Nearby Belmont Abbey College agreed to offer the needed courses if the trustees approved paying the grant to the college. The trustees agreed.

The foundation's board has always tried to work with recipients on the rare occasions when they have been unable to carry out programs as proposed. To this day, the board has sought an alternate use of funds aligned with the original intent of a program in order to keep grant funds at work in the community. As Sacred Heart College proved, it is also helpful for an agency to suggest an alternative use of funds. Only three times has the foundation ever asked an agency to return funds when programs could not be carried out as proposed. While the possibility exists that returned funds might complicate the 5 percent minimum distribution requirement, it was not an issue in this era.

Changes

Before the last board meeting of the year, the world was shocked when stock markets crashed on October 19, 1987, and investments shed tremendous value in a short time. Foundation assets were not exempt, but fortunately for 1988 grant applicants, the minimum distribution was based on assets at the September 30, 1987, fiscal-year close, when capital appreciation was \$507,000.

In December 1987, after nineteen years as pastor, Jim Stuart surprised the congregation when he announced his retirement from First Presbyterian Church, effective February 1988. (The session later named him pastor emeritus.) Jim put great energy into being a responsible board member during the earliest years as he tried to interpret and then act on Carrie and Lena's intentions. The board wanted Jim to continue serving, but after February, he would no longer be the official representative from First Presbyterian Church, placing the foundation out of compliance with the trust indenture. Jick Garland advised that it was acceptable to address the issue the next time the board filled vacancies.

As 1987 came to a close, trustees could reflect on a job well done. Procedures they established to evaluate, decide, and publicize the grants had worked well, bringing positive recognition to the generosity of Carrie and Lena Glenn and to the foundation. They hoped their decisions honored the Glenn sisters and their sacrifices.

When the board met in January 1988, it was the first time since 1972 that the slate of officers did not include Hugh Bryant, chairman, and Judy Miller, secretary. Trustees unanimously elected Jim Stuart, chairman, Dub Dickson, vice chairman, Craig Fielding, secretary, and Trip Stewart, treasurer, and seated the new officers and continuing trustees Hugh Bryant, Judy Miller, and David Wright. The minutes do not record that the board thanked Hugh and Judy profusely for their dedicated leadership for sixteen years, but that surely happened. Hugh later praised his secretary and his company, Jefferson Pilot, for allowing him time to serve and supporting him with staffing and use of office equipment while chairman, which made his responsibilities manageable.

Grant Distributions: 1988

All inaugural grantees sent follow-up reports by the February deadline, and the trustees were pleased to review what 1987 grant funds accomplished. Now it was early March 1988, and with the April 1 deadline rapidly approaching, the foundation had received only twenty-four requests for applications and only three completed applications. To urge a greater response, chairman Jim Stuart sent letters reminding previous recipients of the deadline. In their inexperience, trustees expected that applications would arrive before the April 1 deadline. What they soon learned was that most applications arrive on the due date—as they still do. Ultimately, the foundation received forty-one applications, comparable to 1987, with a distributable amount of \$164,000. Requests totaled \$565,847.

The board funded twenty-one applications. Among grants awarded, \$3,000 went to Gaston County Schools for its afterschool program, \$1,000 more than requested. With more women entering the workforce, the welfare of latchkey children struck a chord with the trustees. A grant of \$10,000 went to the acquired immunodeficiency syndrome (AIDS) education program of the Gaston County Health Department to counter misinformation about transmission of the AIDS virus. AIDS had become a major public-health concern since it arrived in the United States in 1981. A \$10,000 grant for cancer research went to Lineberger Cancer Research Center (Lineberger Comprehensive Cancer Center) at the University of North Carolina at Chapel Hill, a hospital begun with a \$1 million gift by the Lineberger family, of Belmont.

Of the twenty applications the board denied, one was a \$40,000 request from United Way of Gaston County to renovate an office complex it recently purchased to house a number of member agencies under one roof. Since United Way was actively seeking funds, Jim notified the agency right away, letting them know that the request conflicted with the foundation's policy of not ordinarily funding bricks-and-mortar projects.

The trustees decided to stop sending reminder letters to organizations listed in the trust indenture and agreed that it was each recipient's obligation to submit reports showing how funds were allocated. If recipients failed to do so, they would be ineligible to submit future requests. Trustees also asked applying agencies to include a recent balance sheet and

profit-and-loss statement with their applications to provide a better picture of their financial strength and community support.

The Door Slightly Ajar

No sooner had notification letters gone out than Caroline Garrison, executive director of the United Way, requested reconsideration. “We did not consider this just a bricks and mortar request and felt that the word ‘ordinarily’ left the door slightly ajar for very special situations,” she wrote. United Way wanted to enhance the quality of life for the recipients of services, but they could not do it without renovating their building. While sympathetic, Jim Stuart replied on behalf of the board that the project went against established policy and would set a precedent where limited grant funds might be consumed by construction projects. Caroline requested an opportunity to appeal the decision.

The board did not meet again until November 1988, when three representatives from United Way were guests: Caroline Garrison, Martha Edkins, chairman of the United Way board of directors and city executive of Wachovia Bank, and Bill Keith, chairman of United Way’s executive committee and city executive of First Union National Bank. First Union led a consortium of local banks that loaned money to United Way to purchase the building. The three were respected community leaders and prominent members of First Presbyterian Church (making David Wright the only non-Presbyterian in the room).

The delegation asked the board for reconsideration, explaining that United Way and the American Red Cross-Gaston County Chapter had shared office space for a number of years in a former private residence at 317 South York Street. In 1980, the two agencies moved into renovated quarters on the first floor of 200 West Franklin Boulevard (the former Green Stamp store) after an extensive property search led by retired banker Harold Sumner. Harold was the first volunteer director of the Community Foundation, and as a result of his involvement, one office on the first floor was reserved for that foundation.

As staff expanded, United Way renovated the second floor of the building in 1984, and the Red Cross office moved upstairs. In 1987, United Way purchased the entire complex of four adjacent buildings sharing common

walls for \$600,000. United Way volunteers saw the potential to house up to fourteen affiliated agencies under one roof, a move calculated to save United Way \$36,000 a year in agency rent paid in the community. Renovation costs of \$200,000 were required to upfit the complex. United Way needed the foundation as a partner to assure success. The delegation sought a compromise that would allow the foundation to adhere to its policy while accommodating the needs of United Way. Trustees had spent all grant funds for 1988 and were unwilling to dip into the corpus, but they relented and invited United Way to submit an application in 1989.

Fund Manager Selection

As early as February 1987, several potential managers had expressed interest in managing the foundation's portfolio, and Craig, Hugh, and perhaps other trustees interviewed several prospective candidates in March. Each candidate presented performance data and shared investment philosophies, but the finance committee made no selection. As the finance committee continued its investigation, BB&T's trust department cautioned that the foundation could expect a significant increase in fees were more than one fund manager retained, and advocated for a single fund of \$4 million or \$5 million under its sole management. The board was committed to three managers, however, with BB&T continuing as custodian of the accounts.

The board had set autumn of 1988 as the deadline to decide on managers, but then the finance committee offered a new proposal. Its members had become acquainted with Mickey Barnhill, a broker with Interstate Securities in High Point, North Carolina, who kept a personal database of money managers. Given search parameters by the committee, Barnhill would identify three to five managers to interview in narrowing the choices to two managers, plus BB&T. The board agreed to use Barnhill's services. Foundation assets had not rebounded strongly after the October 1987 crash, and assets on September 30, 1988, were virtually identical to those in 1987 at about \$3.1 million. Trustees were shocked to learn that excise taxes were \$13,943 due to the larger corpus and of the requirement that foundations now make quarterly excise tax prepayments.

With Barnhill's help, the finance committee recommended hiring Stein Roe, of Chicago, later called Stein Roe & Farnham, and Astrop Advisory

Management, of Atlanta, and soon to be renamed Caldwell & Orkin. Both firms had one-year returns of over 20 percent and excellent returns for the previous eleven and a half years. The board approved the recommendations and also approved retaining Barnhill for one year to provide quarterly investment evaluations.

BB&T set up two sub-accounts within the master account to provide a combined report from the three managers. Although the board had expected assets to be divided equally among the three, the two newest managers each required investments of \$1.5 million, leaving a smaller share for BB&T. The trustees' only concern about the new arrangement was having access to funds for office expenses and grant payments, but David Wright assured them this would not be a problem.

At the January 1989 meeting, the board elected Judy, Hugh, and David to their second three-year terms. The board did not address the issue of noncompliance.

Grant Distributions: 1989

With two years of experience, the trustees were becoming more confident in their knowledge of local nonprofit agencies, of their staff and volunteers, and of community needs. Thirty agencies applied in 1989, requesting \$366,289. The board made sixteen grants of \$156,591.

The most noteworthy decision was to grant \$30,000 to United Way to renovate its complex, but the board made it clear that it was a one-time gift. Combined with other contributions and a bank loan, United Way completed renovations, housing in the complex its own office, the Community Foundation office, and offices of ten United Way-affiliated programs and services. These included the United Way's Information & Referral Service, the Volunteer Center, American Red Cross, Association for Retarded Citizens (The Arc of Gaston County), Mental Health Association (discontinued), Gaston Literacy Council, Heart Society of Gaston County, Gaston County Cancer Society (Cancer Services of Gaston County), and Family Service of Gaston County and its Consumer Credit Counseling Service.

As a thank you, United Way offered to name the training room at the Gaston Literacy Council's office the Carrie E. and Lena V. Glenn Foundation Training Room. In accepting the proposal, Dub said that the board

thought Carrie and Lena Glenn would have liked the idea, since they devoted their lives to education and learning.

A small grant went to Olney Presbyterian Church, where the Glenn children were baptized and became members, to refurbish the Ladies' Parlor, and to United Way for a dollar-for-dollar match of a coveted \$10,000 grant from United Way of America for a program called Venture Grant. The board awarded its eighth consecutive grant to Crisis Assistance Ministry, citing the sisters' guidance that grant funds go where needed most, to do the most good. This did not happen without a vigorous discussion about how long the foundation should continue to support the same agency with consecutive grants, regardless of need. The foundation informed all recipients that a grant made in the current year did not guarantee a grant in the following year.

Between grant deliberation meetings in April and May, an F4 tornado ripped through western Lincoln County and parts of Catawba and Cleveland counties, causing \$10 million in damages despite touching down in mostly rural areas. With the tragedy so close to home, and with Glenn family members still living in Lincoln County, on May 5, 1989, the trustees made a discretionary grant of \$5,000 to First Presbyterian Church of Lincolnton, fiscal agent for Lincoln County tornado relief.

When the board declined a request from the Presbyterian Home of High Point to add to its endowment fund, Betty Hayes, the home's executive director, questioned the decision. She could not understand why the request was denied when "the Presbyterian Home of High Point was designated as a priority of the Glenn sisters with a specific interest in funds being added to the Endowment Fund to be used in assisting those residents who are in financial need." Hayes requested a list of recipients and amounts granted in 1989.

Jim sent the list and reminded Hayes that the mention of the Presbyterian Home in the trust indenture was only a recommendation. "Our past awards would reflect that consideration has always been given to the donors' suggestions," he wrote. Hayes appreciated the list, but revealed new information in her reply. "Miss Carrie and Miss Lena Glenn were longtime residents of The Presbyterian Home and Miss Gertrude also was with us for many years. Miss Carrie and Miss Lena were very interested in helping those less fortunate than they and actually established anonymously

the Home's endowment fund. To this fund, would be added any additional funds granted Presbyterian Home through the Glenn foundation [*sic*] . . . We shall look forward to making application in future years and shall hope that the trustees will award grants to be added to this fund based on its merit and the recommendations and interest of Miss Carrie and Miss Lena." This was the first time the trustees learned of Carrie and Lena's connection to the home's endowment fund, but it would be another twenty-eight years before the board learned the size of their inaugural gift.

Hurricane Hugo

On September 22, 1989, Gaston County experienced its worst natural disaster since the Flood of 1916. A powerful hurricane called Hugo entered the United States near Charleston, South Carolina, traveling over 200 miles to Gaston County on its way toward Virginia and causing catastrophic losses. Hurricane Hugo's rain and high winds damaged homes, downed trees and power lines, caused flooding, and made travel difficult. Some families lost power for two weeks. George Miller had retired from his orthopedic practice, and through United Way's Volunteer Center, he and Judy organized volunteers to help clear debris from yards of elderly citizens and others needing assistance. They were the perfect pair for this assignment.

Hurricane Hugo taxed the capacities of crisis agencies throughout the county as hundreds of families coped with the disaster. Hugo also disrupted United Way's fall fundraising campaign, resulting in a \$90,000 shortfall and a double-digit uncollectable factor. The board gave United Way permission to reallocate its \$10,000 Venture Grant match for operating expenses.

Growth of Gaston's Nonprofits

By 1990, the foundation had been making grants for eighteen years. When grantmaking began in 1972, a number of nonprofit agencies had been meeting the needs of local citizens for many decades. The more notable ones held national affiliations and included American Red Cross, Gaston County YMCA, Piedmont Council Boy Scouts of America, Pioneer Council Girl Scouts, Salvation Army, Salvation Army Boys and Girls Club, American Heart Association, and American Cancer Society.

In the 1950s and 1960s, as local citizens saw gaps in services, they had formed new nonprofit agencies, including Association for Retarded Citizens, Family Service Inc. of Gaston County, Gaston Boys Club (Gaston Boys and Girls Club) in the Highland community, Gaston Skills, Gastonia Concert Association (Gaston Concert Association), Heart Society of Gaston County, Holy Angels, Schiele Museum of Natural History & Planetarium, and United Community Services, forerunner of United Way. Into the 1970s, more nonprofits sprang up, some of which came along when the foundation began making grants. These included Gaston Literacy Council, Cooperative Christian Ministry (Crisis Assistance Ministry), Gaston County Art & History Museum (Gaston County Museum of Art & History), Gaston Residential Services, Gaston County Cancer Society (Cancer Services of Gaston County), Gastonia Clean City Committee (Keep Gastonia Beautiful), and United Arts & Science Council (Gaston Arts Council).

This trend continued into the 1980s, which saw the incorporation of organizations like Gaston County Children's Council (Alliance for Children & Youth), AIDS Council of Gaston County, Crisis Pregnancy Center, Daniel Jonathan Stowe Conservancy, Loray Girls Home, New Hope Community School of the Arts (Gaston School of the Arts), Cornerstone Christian Center (Alternative Community Penalties Program), West Gastonia Boys & Girls Clubs (Boys & Girls Clubs of Greater Gaston), Habitat for Humanity of Gastonia (Habitat for Humanity of Gaston County), Hospice of Gaston County (d.b.a. Gaston Hospice), and Serving Our Community with Kindness in Springwood (S.O.C.K.S.).

The 1990s continued the trend, with organizations like Art I, Catherine's House, Gaston Together, Gastonia Potters House, Gaston Community Concert Band, Gaston County Education Foundation, House of Mercy, Unity Place, and With Friends. With the rapid development of the region, the Catawba Lands Conservancy and Catawba Riverkeeper Foundation were incorporated to protect land, rivers, and streams. Since the county's population was now 175,000, the work of nonprofit organizations was essential to the overall welfare and quality of life of the community.

Organizations with strong professional and volunteer leadership have remained viable, succeeding because of a clear mission, dedicated and often charismatic volunteer or professional staff, effective volunteer leadership,

knowledge of nonprofit management, strategic goals, a succession plan, and strong community support. Other agencies opened and closed their doors when a leader burned out, or the board did not provide effective support, or the public did not fully embrace the programs or services. Once, in the foundation's earliest days, Judy worried that there might not be enough applicants. That has never been the case.

Three Important Issues

As 1990 unfolded, the board faced three issues. The first was its responsibility to seat a representative from First Presbyterian Church to fulfill a requirement of the trust, but Jim Stuart's successor as senior pastor had not been called yet. In retirement, Jim became the minister of Rumble Memorial Presbyterian Church, in Blowing Rock, North Carolina, where he and his wife, Mary Beth, resided.

The second issue was finding a successor to Linda Dixon, who informed the board of her desire to step aside at the end of the 1990 grant cycle. She worked full-time as the minister's secretary, had a young family at home including twins, and could do the foundation's work only outside her position at the church.

The third issue was whether to change the legal structure of the foundation to a nonprofit corporation, which Jick Garland proposed for consideration. He was working with another indentured trust that was changing to a corporation, and felt it was important to at least raise the subject with the Glenn Foundation.

Noncompliance

At the January 1990 meeting, the issue of noncompliance with the trust indenture was of pressing importance. Dub and Craig's terms were expiring and both were eligible for reelection, but neither satisfied the required criteria. It is likely that Craig offered to step aside out of respect for Dub's longevity, because the nominees became Dub and Sarah Adams Abernethy, who was a member of the session at First Presbyterian Church. Craig seconded their nominations.

Sarah Abernethy was a Gastonia native who attended Memphis College (Rhodes) but graduated from the University of North Carolina at Chapel Hill. As a past president of the Junior Service League of Gastonia before its affiliation with the Association of Junior Leagues International, Sarah was active in the work of the church and would serve as elder and clerk of session.

The newly constituted board unanimously elected Dub the chairman, Hugh, vice chairman, Judy, secretary, and Trip, treasurer, serving with Sarah, Jim, and David. The officers and trustees remained the same for two years. Dub had won election to the North Carolina House of Representatives when he took on the added responsibility of chairing the board, but the knowledge and experience he gained in Raleigh was beneficial. As Craig rotated off, the trustees thanked him for the countless hours he spent securing financial advisors.

Dixon's Successor

Sarah had already received an orientation when Dub presided over his first board meeting as chairman in February 1990. With Linda Dixon's retirement, and in serendipitous timing, Caroline Garrison, the executive director of the United Way, had announced plans to retire effective in June 1990. The board asked Dub to contact Caroline to gauge her interest in working for the foundation part-time. She replied that the prospect of working for the foundation "sounded interesting." When the board met in April 1990 to begin grant deliberations, it instructed Dub to talk to Caroline and present details about the position.

Dub reorganized the standing committees. The administrative committee gave way to the executive committee, comprising the officers of the foundation. The finance committee remained unchanged. The goals and applications committee gave way to the rules/procedures committee now that the application process was firmly established. This committee was charged with making certain that decisions by the board were consistent with the trust indenture and bylaws, but it otherwise continued its traditional responsibilities to revise the application form, brochure, and annual calendar. The board now required applicants to submit seven copies of the entire application, one copy for each trustee, plus financial statements and

balance sheets. Dub established a new committee, the long-term goals committee, to plan the future direction of the foundation. He appointed Jim the chairman.

Incorporation Consideration

When the board convened in March 1990, Jick was present and discussed changing the charter from a charitable trust to a 501(c)(3) charitable corporation. At the same time, Dub supported changing the irregular size of the board with its one class of three trustees and two classes of two trustees each. He advocated for a nine-member board with three classes of three trustees each.

Jick explained that any change to a trust indenture required submitting a petition in a legal action to the North Carolina attorney general. If the attorney general approved, a Superior Court judge had to grant final approval. By contrast, if the foundation converted to a nonprofit corporation, bylaws would govern, and changes could be accommodated simply by a vote of the board. Incorporation offered the foundation greater flexibility and provided certain protections from liability. Conversion would cost about \$5,000 and take about six months, mostly due to delays in securing IRS tax exemption. With the grant review looming, the trustees felt no urgency to convert. It took another year for them to decide officially not to pursue a conversion, and so the foundation remained an indentured trust and the board retained its unusual configuration of seven trustees.

Grant Distributions: 1990

In May 1990, the Rev. Dr. John T. DeBevoise became the new senior minister at First Presbyterian Church (after a two-year search and four interim pastors). Since he would eventually serve as a trustee, the board invited him to sit in on deliberations as an introduction to some of Gaston County's needs.

The distributable amount for the grant cycle was \$185,000, but requests from forty-four agencies totaled \$720,654.¹³ Always conscientious, the board had met already with the county's new health director, Bruce Parsons, to learn about needs in the public-health area. Perhaps influenced by



A 1990 grant to the Sisters of Mercy in Belmont, North Carolina, helped build the House of Mercy to care for homeless men dying of AIDS. The love and attention received by residents prolonged the lives of many of them and some were even discharged. Courtesy of House of Mercy.

knowledge gained in the meeting, trustees awarded several health-related grants from the eighteen applications they approved. In its largest single grant up to that time, the board awarded \$50,000 to the Gaston County Health Department as seed money to establish what became Gaston Family Health Services (Kintegra). The trustees saw the grant as an important investment in improving the health outcomes in underserved communities. Today, the agency serves multiple counties, providing health care, health education, preventive care, and dental services regardless of a client's ability to pay.

The board granted seed money to Sisters of Mercy for a residential facility in Belmont for homeless men dying of AIDS, soon called House of Mercy. A small grant went to a new nonprofit called Mediation Center of Gaston County, a state-funded agency that required local matching funds. The center mediated out-of-court settlements of certain disputes between individuals and among family members. A grant to Gaston County Public

Library funded ArtsQuest, an arts-in-education program that brought nationally recognized professional artists into the public schools for demonstrations and performances. The library met a foundation-required match.

Gaston Literacy Council was a small agency that was operated for many years by volunteers trained in the Laubach way of reading, but it now had professional staff. Executive director Nancy Matherly explained in her application that of North Carolina's 100 counties, Gaston had the third-highest number of adults ages 25 or older without an eighth-grade education. Many had limited or no reading skills, byproducts of the textile industry. United Way's recent needs assessment highlighted illiteracy as the county's number-one problem, and the foundation became an important partner by contributing more than \$100,000 to the council over the coming decade.

By endorsing grant checks, recipients agreed to provide progress reports by February 1991, expend funds as proposed in their applications, and publicize grant awards to recognize the contributions of Carrie and Lena Glenn. The last requirement was added to the 1991 application.

Press releases announcing the awards went out to the *Gaston Observer*, the *Gastonia Gazette*, and the *Lincoln Times-News*. "The foundation board waded through more than forty applications before deciding on eighteen tax-exempt institutions," said Dub Dickson in a story in the *Gaston Observer*. "You would think it would be easy to give away money, but it's the hardest job you can have."

An Administrative Associate

In late August, Dub, with Judy as chairman of the rules/procedures committee, met with Caroline Garrison to discuss the position of administrative associate. Duties included maintaining office equipment, files, and correspondence; responding to all inquiries; recording meeting and committee minutes; preparing the annual calendar; preparing and distributing agendas; staffing the grant process; updating all printed materials; and performing any other duties required by the board. Caroline would be an independent contractor working ten hours a month.

The board approved the terms on September 17, 1990, and Caroline agreed to begin on October 1, 1990. John DeBevoise generously offered

the foundation office space at First Presbyterian Church, and the foundation and the church soon finalized an agreement of understanding, which could be terminated by either party upon thirty days' notice. Caroline was assigned the vacant associate minister's office, but soon moved to nearby space until it was needed as a Sunday school classroom or other church-related purpose.

The foundation installed a separate telephone line and purchased a computer and printer. Caroline had the use of the church's copy machine on a reimbursable basis. Intangibles of great assistance during her tenure were the use of meeting space and many in-kind services, including utilities and help from the church staff to receive applications when she was not at her office. The foundation cancelled its post office box and began using the church's address, 1621 East Garrison Boulevard. The board thanked Linda Dixon for her faithful service with a monetary gift.

CHAPTER 6

The Garrison Era Begins

1990–1993

In hiring Caroline Garrison, the board acquired a person with experience in nonprofit management and well-versed in Gaston County's human service agencies. She had served as communications director at United Way beginning in 1973, and became executive director in 1984. She knew leaders in the business and nonprofit sector, managed a thirty-six-member board of directors, and headed an annual campaign of over \$2.5 million. She knew all the trustees. Her credentials and pleasing personality were a perfect fit for the foundation.

Caroline was born in Georgia but grew up in Florida. In college, she met and married Max Stuls, a US Navy pilot. He died in service to his country, leaving Caroline a widow in her early 20s with a 14-month-old son. Caroline returned to Georgia, where she hosted a daily radio show, "Coffee with Caroline." During this time she met and married Avery Garrison, a Clemson graduate who worked in textiles sales. They had two daughters. Avery's work took them to Greenville, South Carolina, where Caroline became a volunteer for the symphony, was a model and a commentator for fashion shows, joined a music club, and served as campaign manager for the first woman elected to the South Carolina House of Representatives.

Their next move was to Gastonia in 1971, where Caroline easily assimilated into the community. Her community experience was extensive—the boards of advisors of Belmont Abbey College and BB&T, and the boards of directors of Holy Angels, Pioneer Council Girl Scouts, and the Gaston County Chamber of Commerce. She served as campaign chairman for



Caroline H. Garrison served the foundation as administrative associate from October 1990 to December 1999 and as a trustee from 2000 to 2006. Courtesy of Laura G. Lineberger.

the successful North Carolina Senate campaign of Helen Rhyne Marvin, of Gaston County. Caroline was a member of the Gastonia Music Club, a founding member of the United Arts & Science Council, and one of the first three women inducted into the Rotary Club of Gastonia in 1989, which until that time was an all-male organization. She served as an elder and Sunday school teacher at First Presbyterian Church.

One of Caroline's initial assignments was to obtain pictures of Carrie and Lena from the Glenn family for the promotional brochure. The family loaned her the sisters' graduation pictures from the Normal, which have been used ever since. Through five board meetings held during her first full year, Caroline became more and more familiar with the foundation's operations and traditions. She found it a new and enjoyable experience to administer a board of only seven members, give money away without raising it first, and still be involved with meeting community needs. She enjoyed her responsibilities and was excited to contemplate the good that could be accomplished in her new role.

Grant Distributions: 1991

As always at the first deliberation meeting, to remind themselves of the sisters' guidance, the trustees read Carrie and Lena's letter to Bob Rosebro. Over several meetings, they pored over fifty-one requests totaling \$891,199, over four times the amount available to distribute, and awarded twenty-four grants totaling \$200,000.

Six grants went for operating expenses of local agencies. A small but meaningful grant of \$2,379 went to the Pioneer Council Girl Scouts to support Y'All Come, an international Girl Scout Wider Opportunity program at Camp Golden Valley featuring the heritage of the southern Appalachian Mountains.

A grant of \$5,200 to the Gaston County Museum restored Carmine Coletta's iconic, horse-drawn "Tony's" ice cream wagon, part of the museum's permanent collection displayed at the Daniel Stowe Carriage House on the museum's grounds. The wagon is part of the largest collection of



Coletta Ice Cream's horse-drawn delivery wagon before restoration. Will Glenn's daughter Mary Glenn Thompson enjoyed ice cream in the 1920s, when the wagon waited for children to be dismissed from Central School on Second Avenue. Courtesy of the Glenn Foundation archives.



The restored Coletta Ice Cream wagon is housed at the Daniel Stowe Carriage House at the Gaston County Museum of Art & History in Dallas, North Carolina. Postcard courtesy of the Glenn Foundation archives.

horse-drawn vehicles from the nineteenth and twentieth centuries in North Carolina. At the end of the meeting, they made a \$5,000 discretionary grant to First Presbyterian Church to address emergencies of church members and “suffering indigent persons,” as described in the trust indenture, as a thank you to the church for the use of office and meeting space.

Because of the donated office space, the foundation’s expenses were modest and included only contract labor, conference fees, office supplies, telephone bills, trustees’ fees, and a few other miscellaneous expenses. Unlike the early days, the trust department now transferred grant funds to the office checking account, and Caroline wrote checks co-signed by the board chairman. Caroline was making life easier for the trustees. In Dub’s words, she was a “plus” for the foundation.

“A Gift in Gastonia”

In July 1991, a wonderful human-interest story about the Glenn Foundation that appeared prominently on the editorial page of the *Charlotte Observer* brought regional exposure. Entitled “A Gift in Gastonia,” it included pictures of Carrie and Lena Glenn, Jick Garland, board chairman Dub Dickson, and administrative associate Caroline Garrison. The piece was written by associate co-editor Tom Bradbury, the husband of Marilyn Bradbury, who staffed the Charlotte Area Donors Forum. (That connection undoubtedly made Tom aware of the foundation.) The editorial spoke of Carrie and Lena Glenn and the foundation’s charitable leadership. Four months later, the trustees joined the Donors Forum and found it to be a wonderful vehicle for networking and learning from interesting speakers in the areas of philanthropy and community needs. In January 1992, the foundation cohosted a meeting of the Donors Forum in Charlotte with the Community Foundation and the Ralph S. Robinson Sr. Family Foundation.

As the board contemplated Hugh, Judy, and David rotating off the board, the trustees were concerned that three new trustees with no prior experience would be joining the board, and discussed the qualities they desired in future candidates as well as the contents of an orientation program for new trustees. They decided to elect new trustees at the fall meeting and seat them at the end of the January meeting, so they could conduct a board orientation between meetings. That practice continues.

Developing an orientation program for new trustees became a priority. The trustees wanted to be sure newcomers had a sense of the character and sacrifice of the founders and of the policies and practices developed over the years. Orientation materials included copies of the trust indenture, by-laws, a list of trustees with contact information, the calendar, committee descriptions, a five-year history of giving with categories, financial statements, an explanation of the minimum distribution requirement, and the application form and brochure.

As chairman of the long-range planning committee, Jim recommended examining the adequacy of existing grant categories, the value of site visits to applying agencies, criteria for selecting trustees, and a plan to work jointly with other foundations. The action step for the final goal was to meet with representatives from other local foundations to share information, which continues periodically.

Knowing she was rotating off the board, Judy presented a comprehensive document from the rules/procedures committee based on her extensive experience. It included grant procedures, committee descriptions, public relations notes, and printed material like the application form and brochure. It was the start of a board policy manual.

Under the new fund managers, the foundation's portfolio continued to grow nicely. They generated actual returns of 9.82 percent in their first year in 1989, and assets were now valued at \$4 million. Working with David Ellis, BB&T's Western Trust Division manager, Bob Jacobson of Stein Roe, and Eugene Caldwell of Caldwell & Orkin, the finance committee adopted an aggressive investment policy of 65 percent equities and 35 percent fixed.

Changing of the Guard

The January 1992 board meeting was a true changing of the guard as Hugh Bryant, Judy Miller, and David Wright concluded their service after a combined forty-nine years of experience. They had provided exceptional leadership. New officers for 1992 included Dub Dickson for a second term as chairman; Sarah Abernethy, vice chairman; Jim Stuart, secretary; and Trip Stewart, treasurer. The new trustees included Rev. Dr. John DeBevoise as the church representative, W. Alexander Hall Jr. as the bank representative,

and Lonnie A. Waggoner Jr., MD. Included with orientation materials was an invitation to attend the November board meeting as observers.

The new trustees were an impressive trio. John DeBevoise was the son of a Presbyterian minister and grew up in Orlando, Florida. He served as associate pastor of Palma Ceia Presbyterian Church in Tampa, Florida, before answering the call to Gastonia. A graduate of Eckerd College in St. Petersburg, Florida, John earned a master's degree in theology and a doctor of ministry degree from Union Theological Seminary, in Richmond. He was warm and engaging, with a wonderful sense of humor that endeared him to his flock. Although a newcomer, he had quickly become involved in the community.

Alex Hall was a Wilmington native who came to Gastonia in 1971 to work for the Citizens National Bank. A loyal graduate of North Carolina State University, he was president of the Western Region of BB&T, but in 1995 would become president and CEO of First Gaston Bank, a new community bank. His leadership in community activities included Piedmont Council Boy Scouts, Gaston County Chamber of Commerce, United Arts Council, Gaston Hospice, Gastonia Airport Authority, and Gaston County Economic Development Commission, and he was a past president of the Rotary Club of Gastonia. He served as a deacon, elder, and gifted Sunday school teacher at First Presbyterian Church. Alex brought his financial acumen and exceptional insight to the business of the foundation.

Lonnie Waggoner was the first internal medicine specialist in Gastonia but was now retired. A graduate of Duke University and Duke Medical School, he had served as chief of staff at Gaston Memorial Hospital and president of the Gaston County Medical Society, as well as on the boards of the Heart Society, Council of Aging, Schiele Museum, Habitat for Humanity, and the Rotary Club of Gastonia. A leader at Holy Trinity Lutheran Church, Lonnie was a compassionate man interested in helping the less fortunate.

Grant Distributions: 1992

When the board met for the 1992 grant cycle, assets were over \$5 million. The trustees had \$212,000 to distribute. The board had asked Caroline to develop a summary form with basic information about each applicant, the

program to be funded, and future funding prospects. Her summaries for the fifty-eight applications greatly facilitated the trustees' review.

The trustees opened the grant deliberation meeting with prayer. They had begun using the first grant-deliberation meeting to discuss only the merits of their collective preferences, with no discussion of money. When they finalized allocations on May 18, they made grants to twenty-four programs and services.

One was a discretionary grant of \$1,000 to First Baptist Church to honor David Wright's nine years of service as a trustee. The two largest grants, of \$20,000 each, provided start-up funds for two important new organizations. The first went to With Friends, a teen homeless shelter established in January 1991, for salaries and operating costs. The teen shelter was identified by the Gaston County's Quality of Family Task Force as the number-one need for families, since troubled teens were regularly transported to shelters outside the county. The Sisters of Mercy generously donated space in a building on the former Sacred Heart College campus to the new agency. The second grant went to the new Gaston County Education Foundation to support special projects to benefit Gaston County Schools. This foundation was a welcome addition to the philanthropic community.

The board granted \$19,510 to the Department of Social Services toward construction of a shelter for women and their children who were victims of domestic violence. The existing shelter had opened in a small house in 1982 and had been inadequate for many years. When the building was completed in 1995, it was named the Shelter of Gaston County. (In 2018, it was named the Cathy Mabry Cloninger Center for its longtime director.) In making this grant, the board relaxed its policy on bricks-and-mortar projects, but the new shelter made an important statement about how the county took care of a vulnerable segment of its population. Some years later, trustee John Corbett was fond of saying that the Glenn Foundation followed the Golden Rule: "He who has the gold, rules." Corbett's version of the Golden Rule has permitted exceptions to the grant guidelines, allowing the trustees flexibility to address important community concerns when they have seen the need.

The board granted \$5,000 to a new-old agency called the Alliance for Children & Youth, the former Gaston County Children's Council, led by children's advocate Priscilla "Brownie" Smyre. At the request of United

Way, whose volunteers and funders were concerned about duplication of efforts of several youth-serving agencies, the Alliance was formed after a year-long feasibility study led by Martha Burris, head of the NC Cooperative Extension Service. Adolescent Health Council, Horizon Youth Services, and Gaston Families for Drug Free Youth dissolved and transferred their assets to the Children's Council, renamed the Alliance. The four agencies had received foundation grants over the years, but the 1992 grant funded an ongoing pregnancy prevention program that the Adolescent Health Council started in three public schools.

A final grant of note went to the Arts Fund of Gaston County, the annual campaign of the United Arts & Science Council. The Arts Council funded seven arts organizations: Gaston County Museum, Gaston Dance, Gaston School of the Arts, Gastonia (Gaston) Community Concert Association, Gaston County Art Guild, Little Theater of Gastonia, and Gaston Choral Society. After making this grant, the trustees began to question their funding of umbrella campaigns.

When the trustees met in October 1992 to evaluate the grant process, they approved a procedural change limiting grant meetings to three hours, after meetings had gotten lengthy the previous spring. Since recipients reported their program results to the board in a variety of formats, the trustees asked Caroline to create a standard reporting form. They also agreed to hold an extra meeting in December to share information that delegates learned at the Southeastern Council of Foundations Conference.

During the grant cycle, there was evidently a problem with an agency meeting the deadline, and so the board affirmed that it would not consider applications received after April 1. This grant cycle also was the first time that conflicts of interest were mentioned, a concern raised by the new trustees who were involved as volunteers with several applicant agencies. (Conflicts may have been disclosed previously, but this was the first mention in the board minutes.) From then on, trustees disclosed conflicts before deliberations began, although they would not adopt a formal statement until 2006. Trustees also formally confirmed that they would treat all information as privileged and keep all discussions confidential.

A New Trustee

Dub completed two consecutive three-year terms and the board elected retired businessman Daniel B. Moser to succeed him. The trustees also reelected Sarah Abernethy for her second three-year term. The nominating committee developed eight qualities for selecting future trustees and used them to select Dan, but regrettably, no record of them can be located.

Dan Moser was a graduate of Duke University and an ex-Marine who spent his career in textiles, rising to senior vice president and sales manager for Textiles-Incorporated (Ti-Caro). After his retirement, he worked for Kings Industrial Supply and joined the Rotary Club of Gastonia. He was active on a number of community boards, and served on the Downtown Merchants Association and as president of the Gaston County Chamber of Commerce. He held many leadership roles at First United Methodist Church in Gastonia.

Grant Distributions: 1993

As 1993 unfolded, the board elected Jim Stuart the chairman; Sarah Abernethy, vice chairman; Trip Stewart, secretary; and Alex Hall, treasurer, serving with Dan Moser, John DeBevoise, and Lonnie Waggoner. Jim introduced the practice of holding an executive committee meeting a week before the board meeting, to map out the agenda. Since 1986, when the corpus increased, the board had received a compilation from Cherry Bekaert & Holland, the lowest level of review. Considering the size of the corpus, Jim Ratchford urged the board to consider the next step up, a financial review, advice the board readily adopted. The board seated Dan and Sarah and started a new tradition when the trustees adjourned for a luncheon to thank the outgoing trustees and to welcome the new ones.

The minimum distribution was \$230,000, and the board funded twenty-seven of forty applications for \$236,806. One \$10,000 grant funded renovations to a lodge at Camp Rotary, owned by the Pioneer Council Girl Scouts. The scouts needed the space to provide room for indoor activities and a library with environmental educational materials and other resources. To thank the foundation, the council named the building the Glenn Sisters

Lodge. Another grant funded Serving Our Community with Kindness in Springwood (S.O.C.K.S.), a community helping agency established in 1987. It resulted from a meeting Max Erwin, United Way's planning director, and others held with county crisis agencies to identify the specific geographic service areas for each. S.O.C.K.S. filled an unserved area between Belmont, McAdenville, and Stanley known as Springwood.

A grant to the Gaston County Museum funded an exhibition of the works of Ralph "Buddy" Ray Jr., a nephew of Lucius Glenn's wife, Mena Ray Glenn. Ray was a gifted artist and illustrator who died in 1952 at the age of 32. Preparing the exhibition took investigation, since most of Ray's works were in private collections in Gastonia and elsewhere. Many needed frames. One visitor to the exhibition was a young associate professor of biology at Belmont Abbey College, Robert Tompkins, who would not soon forget Ray's exquisite depictions of the natural world.

In a rare grant to an out-of-county agency, the board funded a Presbyterian-founded residential substance-abuse recovery center in Boone, North Carolina, called Hebron Colony and Grace Home. It funded salary and utility costs for Catherine's House, located on the former Sacred Heart College campus operated by the Sisters of Mercy. Catherine's House was a homeless shelter for women and children formerly called Herastar. The board also funded a request from the Gaston County Public Library called the Local History and Genealogical Preservation Project. As a result of the grant, the library bound Lon Glenn's "John Glen" and "Allied Families" genealogies, as well as many other important documents of local history in the library's North Carolina Collection. Faceplates recognized the Carrie E. and Lena V. Glenn Foundation.

Autonomy

When the board convened in October, several new trustees reported that they had been contacted by representatives of the Community Foundation about placing the Glenn Foundation's assets under its auspices. While the board always encouraged cooperation with other foundations, they agreed that prospective candidates for the Glenn Foundation board should be made aware of the keen desire to keep the foundation an independent entity. The board passed the following motion:

The Board of the Carrie E. and Lena V. Glenn Foundation expressed its view that the foundation's autonomy is a vital part of its character. The existence of more than one foundation in the community is an advantage to the community. Because of this advantage and the particular history of the Glenn sisters in the creation of this foundation, the Board believes it is prudent not to place the Glenn foundation's funds under the purview of another foundation, even in a donor-advised or restricted basis.

This statement affirmed the trustees' unwavering commitment to honor the roots of the foundation, the Glenn sisters' sacrifice, and to remain a stand-alone organization. Other factors were the foundation's long-term relationship with First Presbyterian Church and the smaller board's flexibility to make decisions quickly. A donor-advised fund would add a layer of bureaucracy to decision-making. As Dan Moser later observed, "There is no competition between lighthouses."

New Blood

Jim Stuart and Trip Stewart's terms were expiring after six years of service. The board reelected Dub Dickson after a year's absence, and elected attorney Elizabeth Neisler "Liz" Sumner as a new trustee. The two attended the December board meeting as observers. Jim, Sarah, and Caroline had attended the 1993 Southeastern Council of Foundations Conference in New Orleans, and Sarah, in particular, came away impressed with the proactive nature of some foundations. She was especially drawn to a school program of the Community Foundation of Tampa, Florida, that encouraged leadership development and community service opportunities for youth. The board asked Sarah to contact the Florida foundation for more information, and what she learned would open up an avenue of innovative funding.

CHAPTER 7

Special Projects

1994–1998

Prior to the January 1994 board meeting, the finance committee met with the three fund managers. Caldwell & Orkin was the most aggressive investor, Stein Roe & Farnham middle-of-the-road, and BB&T the most conservative. The committee approved giving each manager one-third of the assets and rebalancing the portfolio every three years. It would soon approve investing 4 percent of assets in a hedge fund run by Caldwell & Orkin.

Nine trustees were present, including five continuing trustees, Sarah Abernethy, chairman, John DeBevoise, vice chairman, Dan Moser, secretary, Alex Hall, treasurer, and Lonnie Waggoner; two incoming trustees, Dub Dickson and Liz Sumner; and two outgoing trustees, Jim Stuart and Trip Stewart. The officers remained in place for two years. Jim Ratchford and Alice Auten, of Cherry Bekaert & Holland, presented the financial review and reported a minimum distribution of \$226,370 available for the 1994 grant pool.

At the luncheon following the board meeting, incoming chairman Sarah Abernethy presented Jim and Trip with plaques and expressed the board's deep appreciation for their service. Jim had served the fledgling foundation when assets were the smallest, and Trip had served from the first year of the larger corpus. For now, Dub alone would carry his institutional knowledge forward.

Liz Sumner was a native of Cleveland County, North Carolina, and a graduate of Davidson College and Wake Forest University Law School.

Her husband, H. Randolph Sumner, was one of four sons of Harold Sumner. Liz's volunteer involvement included serving on the boards of Gaston Hospice, United Arts Council, Pioneer Council Girl Scouts, Gaston County YMCA, Heart Society of Gaston County, and the Junior League of Gaston County. She had served First Presbyterian Church as a deacon and elder.

School Projects Plan

Sarah reported on the Community Foundation of Tampa's school projects, and the trustees were willing to initiate a program. Don Ratchford, director of secondary education for Gaston County Schools, gathered representatives from Ashbrook, Bessemer City, Cherryville, East Gaston, Hunter Huss, North Gaston, and South Point high schools, and Gaston Day School, to hear a presentation about what the foundation called the School Projects Plan. It was to be a one-year pilot partnership to promote volunteerism and community service through existing high school service clubs. If successful, it would provide good public relations about youth doing helpful projects in the community.

The schools agreed to participate, and the board approved a trial allocation of \$12,000 to provide each school with \$1,500 regardless of enrollment differences. Schools created their own application and managed the money in a separate account, and the school coordinator and youth committee selected the projects. They could not spend funds on programs already operating unless they identified additional needs, and clubs could collaborate on a project. The foundation expected follow-up reports on completed projects by April 1995.

Grant Distributions: 1994

The board received a number of requests from outside the county and whittled the applications from fifty-nine to forty-five, including the eight high schools participating in the School Projects Plan. Caroline now tallied the trustees' top ten and bottom ten preferences before the first meeting, which saved time and helped focus the discussion. Trustees did not rank the applications but merely gave their preferences.

With a grant pool of \$231,812, more than the minimum distribution, the board awarded \$5,000 to the Presbyterian Home Foundation for its endowment fund. In turn, with the trustees' concurrence, the home named the fund the Glenn Sisters Society, valued at close to \$2 million in 2022. Members of the Glenn Sisters Society are primarily residents who have indicated future support of the home through estate gifts. Each spring, they are recognized at a luncheon to thank them for their generosity in building a lasting legacy for residents.

Baptist Children's Homes of North Carolina operated two emergency-care cottages located on the Cherryville-Dallas Highway, called receiving homes, for children and youth removed from troubled families. The grant funded a much-needed copy machine. Carrie Glenn's second-grade student Mickey Blackwell, now Dr. Michael Blackwell, president and CEO of Baptist Children's Homes, wrote in a cover letter that Carrie Glenn had always encouraged him when he was a small boy at Flint Groves Elementary School.

A grant went to an innovative program called Super Cupboard, supported by Crisis Assistance Ministry and First Presbyterian Church. It used volunteers to help young mothers on public assistance become self-sufficient by teaching nutrition and food-preparation techniques, financial management, parenting skills, hygiene, and employment skills. The foundation funded this program for two years. Another grant, to the Gaston County Cancer Society, underwrote an effort to reduce tobacco sales to minors. Teams of trained 13- to 15-year-olds tried to purchase tobacco products at 100 stores around the county as a way to test merchants' adherence to tobacco laws. The program received good coverage in the *Gastonia Gazette*.

New March 1 Deadline

Beginning with the 1995 grant cycle, the board moved the application deadline to March 1, since the April 1 deadline often pushed grant deliberations into June. Because submissions to the foundation were delivered in notebooks or file folders with fancy cover sheets, sectional dividers, and other embellishments, Caroline instructed potential applicants to remove excess materials from their applications. It was the content of the application that was important.

Before the March 1 deadline, the trustees received follow-up reports



Twelve volunteers from the Hunter Huss High School Graphic Arts Club painted the interior of the Gaston County Cancer Society office and restocked supplies as part of Make a Difference Day. The project was highlighted in the April 23, 1995, *USA Weekend* special issue. Courtesy of the Glenn Foundation archives.

from the School Projects Plan and were pleased with the results. Clubs in the eight schools had completed a variety of projects, helping needy families at Thanksgiving and Christmas; assisting with the building of a Habitat for Humanity house in Mount Holly; creating a garden for residents of a rest home; pairing eleventh-grade students with seventh- and eighth-grade students in a successful math-tutoring program; and establishing a small library in a Belmont low-income housing project by securing donated books, building shelving, and cataloguing books. Eight members of the Graphics Arts Club at Hunter Huss spent two days painting the inside of the Gaston County Cancer Society's office at the United Way complex, and they also restocked supplies. Their project was recognized by Make A Difference Day, sponsored by *USA Weekend* and the Points of Light Foundation. It was named Gaston's Outstanding Local Project and received mention in *USA Weekend* magazine.

Because of the initial success of the School Projects Plan, the board renewed the \$12,000 grant for two more years, in 1995–96 and 1996–97. It added Gaston Christian School when it started a high school component in 1996, and later added grants to the high schools at two other private schools,

Cramerton Christian Academy and Victory Christian Academy. The board eventually paid the public schools' grant to the Gaston County Education Foundation for simplicity of accounting. Public school grants were formally discontinued in 2001, but the board continued to fund programs at several private schools. Grants to the Interact Club at Gaston Christian School continued until 2005 because of the quality of the projects undertaken.

A Focus on Community Needs

In November 1994, nineteen representatives of Gaston County foundations and other philanthropists heard a panel discussion about community needs hosted by the Glenn and Community foundations. Presenters were John DeBevoise, senior minister at First Presbyterian Church; Barbara Voorhees, United Way executive director; and Charles Zeigler, CEO of the Public Service Company and president of the Community Foundation. John Edgerton, the first paid executive director of the Community Foundation, served as moderator. He and Barbara had assumed their positions that spring. The panel presentation shone a spotlight on illiteracy, which continued as the county's single greatest problem.

As the 1995 grant process got underway, Liz Sumner led the planning for a follow-up meeting with local foundations focusing on literacy. The informative meeting took place in March at the City Club of Gastonia with twenty-five guests. Presenters were Rowe Henderson, general manager of Firestone Fibers & Textiles, who led the literacy program at his plant; Anne Neal, instructional specialist for Gaston County Schools; and Bill Medl, founder of a program called Rebound at Hunter Huss High School. The speakers covered adult workplace literacy programs, program options for students in kindergarten through third grade, English as a Second Language classes for foreign students enrolled in public schools, and senior high school programs to aid the slow reader.

Grant Distributions: 1995

The earlier deadline of March 1 did not deter agencies from applying in 1995. The board funded thirty-one applications totaling \$213,000. With literacy now at the forefront, almost a quarter of grants funded educational projects.

One grant of \$23,000, to the Rotary Club of Gastonia, provided seed money for the club's seventy-fifth anniversary project, the Rotary Task Force on Education and Life Long Learning, or ROTELL. It aimed to implement an immediate action plan to attack Gaston County's illiteracy problem on multiple fronts. Over several years, in a project involving the leadership of Rotarians Caroline Garrison, Max Erwin (now retired from the United Way), and Lonnie Waggoner, foundation trustee and club president, along with a committee of Rotary volunteers and public school personnel, ROTELL provided seed money for mini-grants to literacy programs. Among them were summer programs designed to keep elementary school children from falling behind. The foundation provided a two-to-one match for Rotary funds; however, Rotary Clubs are not 501(c)(3) charitable organizations so the grant was improper. Project funds met needs, however, programs were effective, and the project was conducted in good faith.

Thanks to a successful United Way campaign, the Gaston Literacy Council hired two new staff members, and a foundation grant provided equipment for these positions. Grants funded United Arts Council's Kaleidoscope Children's Art Series, a hands-on art program; a television documentary entitled "History of the Textile Industry in Gaston County" for public television station WTVI-Channel 42, in Charlotte; and an important permanent textile exhibit at the Gaston County Museum that promoted the heritage and culture of the county. This was a huge undertaking that took several years to complete.

In its first-ever multiyear grant to an international destination, the board committed \$2,000 per year for three years to the Charles W. Pearson Sr. Handicapped Children's Fund of the Community Foundation to benefit Lumiere Medical Ministries. Lumiere was a Gastonia-based Christian organization that supported screening clinics and surgeries in remote areas of Haiti for children with congenital, developmental, and traumatic abnormalities. Its president, Gastonia orthopedic surgeon Dr. Edward S. "Buddy" Whitesides, established the Pearson Fund as a memorial to honor Pearson, an outstanding local athlete and businessman who served on the board of Lumiere at the time of his unexpected death in 1990. His son and namesake would later chair the foundation's board.

Two other grants provided operating support for Cornerstone Christian Center, a 120-day, residential, substance-abuse treatment facility for adult

men, and for a new agency called Interagency Resource Project. Housed at the Cornerstone building, it assisted clients in locating jobs and housing and funded rent deposits.

In July 1995, John DeBevoise stunned the congregation of First Presbyterian Church when he announced his acceptance of a call as senior minister at Palma Ceia Presbyterian Church, his former church in Tampa. His departure was a loss to the church, the community, and the foundation. John was credited with organizing community Lenten services and a cross-denominational pulpit exchange, among other involvement. Jim Stuart returned to serve out John's unexpired term.

Peirce Report

In October 1995, trustees attended the Charlotte Area Donors Forum, where Bill McCoy, of the UNC Charlotte Urban Institute, presented the findings of "The Peirce Report: Recommendations for Our Region's Future." Neal Peirce and Curtis Johnson, nationally syndicated urban writers, had come to Charlotte to analyze the region's strengths and weaknesses in the areas of leadership, growth, workforce, and neighborhoods. They based much of their report on interviews with 100 regional leaders. The results were published in four weekly issues of the *Charlotte Observer* in the fall of 1995 and funded by a number of organizations led by Foundation for the Carolinas. The researchers concluded that Charlotte and the surrounding communities, including Gaston County, were one region, one economy, one environmental area, and one society.

Trustees who attended the forum thought the report's findings were so significant for Gaston County, as the region's second largest county, that they invited McCoy to repeat his presentation to the Gaston County foundation group. The board later made a discretionary grant to Foundation for the Carolinas to support a fourteen-county regional planning group called Central Carolinas Choices (later Voices and Choices), organized to implement recommendations from the Peirce Report.

New officers for 1996 were Lonnie Waggoner, chairman; Dan Moser, vice chairman; Elizabeth Sumner, secretary; and Alex Hall, treasurer. These officers held their respective posts for two years. Sarah Abernethy rotated off after six years, and the board elected John A. Corbett, city

executive of BB&T, to succeed her. John was a logical choice, since Alex no longer represented BB&T after joining First Gaston Bank the year before.

John Corbett was a graduate of the University of North Carolina at Chapel Hill, and spent his career in banking. He often joked about joining a small bank only to have it be taken over by a larger bank, then moving to another small bank that was taken over by larger bank. In his role at BB&T, he had already made his mark on the community as chairman of a successful United Way campaign. He filled the banker's position on the board.

Grant Distributions: 1996

The minimum distribution for 1996 was \$218,000 and the board made thirty-six awards. Representative grants included funds to purchase an augmentative-communication system for special-needs students at Webb Street School who could not communicate through speech or sign language; computers for St. Michael School; operating expenses for the Gaston Literacy Council, where requests for services continued to mount; program funds and equipment for the new veterinary technology training facility at Gaston College; and computers and software for daily classes in reading, language arts, and math at the Gaston Boys and Girls Club in the Highland community, which the club named the Glenn Computer Lab. The foundation funded an exhibit, educational programs, and a workshop on the prehistory and early history of the North Carolina Piedmont at the Schiele Museum, which included a special commemoration of Gaston County's 150th anniversary on December 21.

When the grant cycle concluded, the board held a planning session. Jim provided a brief orientation about the Glenn sisters, stressing their strong faith in their bank and their minister. Carrie and Lena had survived hard times and knew the value of hard work and saving, Jim said, and he asked the trustees to honor their spirit and sacrifice. Dub added that helping humanity have a better life was their goal, and that their funds grew substantially through "large, prudent investments in local industry."

The trustees also reviewed and refined grant policies, which they usually did after most grant cycles. Interested in helping people rather than property, they held fast to their policy against funding bricks-and-mortar projects, defining them as new construction, but for the first time, they

formally agreed to fund renovations and repairs. If trustees offered a matching grant, they would set a time limit for the match to be met. They did not want the foundation to become a line item in any agency's budget, they said, although they recognized that some agencies might require continuous funding because of their special mission in the community. Liz Sumner drafted a statement for the application form affirming that grants were for one year only, and that a grant given one year did not guarantee continued funding in future years. Recipients of multiyear grants would need to reapply each year.

1996 Southeastern Council of Foundations Conference

In the fall of 1996, Caroline and the trustees who attended the Southeastern Council of Foundations Conference were enthusiastic about the keynote presentation called "A Tale of Two Souths," by John P. "Jody" Kretzmann, PhD. He was co-director of the Asset-Based Community Development (ABCD) Institute at Northwestern University and conducted research, produced materials, and advocated for community-based, citizen-driven efforts to solve problems and build stronger and healthier communities. Trustees wanted to bring Kretzmann to Gaston County and asked the Community Foundation and First Gaston Foundation to be co-sponsors.

The First Gaston Foundation was a private charitable foundation, chartered in 1950 by Albert G. Myers Sr., of Textiles, Incorporated, who wanted to give back to the employees and the community that were such an important part of the company's success. The Albert G. Myers Scholarship program for children of employees began in 1953 and was offered in communities where the company had plants. After Dixie Yarns bought Ti-Caro, scholarships became limited to Gaston County college-bound high school seniors. Any grant funds remaining from its minimum distribution, after scholarships were awarded, were unrestricted. The unrestricted corpus was larger than the foundation's, but the annual scholarships reduced the amount of the discretionary grant pool.

In the spring or summer of 1997, Kretzmann spoke at Gaston College and led a workshop for local nonprofits. His visit had a profound impact on Gaston County leaders, as he espoused his message of citizen-driven efforts to solve problems and build stronger and healthier communities.

In August, trustee John Corbett, president of the Gaston Regional Chamber (changed from Gaston County Chamber to Gaston Chamber in 1993 but called Gaston Regional Chamber), gathered other community leaders to form a new nonprofit organization called Gaston Together: Communities of Excellence, whose purpose was to bring people together to address grassroots problems, develop solutions, and promote understanding and cooperation.

Grant Distributions: 1997

In the mid-1990s, the economy was doing well. Foundation assets grew by 16.5 percent due to the finance committee's aggressive approach to investing. The minimum distribution was \$242,000, the largest grant pool to date. The board made thirty grants, including one to East Gaston High School to replace 800 library books that had been destroyed by mildew caused by poor ventilation after carpets had been cleaned; to Gaston Hospice for a program called Butterflies, grief classes for children who lost a family member to death; and for start-up costs for educational materials, computers, printers, and software for Gaston County's newest high school, Forestview, scheduled to open for the 1998–1999 school year.

A grant paid for Christian education materials and equipment for Southminster Presbyterian Church, a new church being built on Hoffman Road in Gastonia as an outreach project of the Western Presbytery of North Carolina. The church was heavily supported by First Presbyterian Church, which provided a number of charter members including Laura and Robbie Lineberger, Alice and Jimmy Thompson, and Blanche and Charles Wetzell.

A grant funded the publication and distribution of the United Way's most recent needs assessment, and another contributed to the Salvation Army's \$1.323 million Centers of Hope campaign to renovate, expand, and furnish the social services center on the corner of Broad Street and Main Avenue. The organization ultimately built a new building when renovations proved too costly and impractical.

The board also awarded two discretionary grants, the first toward a college scholarship endowment at Ruple Memorial Presbyterian Church to honor newly retired Jim Stuart's service there. The Stuarts were now living in Covenant Village, the facility Jim had helped inspire in the late 1970s.



The board of trustees gathered at the Gaston Country Club to celebrate twenty-five years of grantmaking in December 1997. L. to r., facing clockwise: Jick Garland, Linda Dixon, Judy Miller, Lonnie Waggoner, Trip Stewart, John Corbett, David Stoker, Craig Fielding, Jennie Stultz, Lud Hodges, and Liz Sumner. Courtesy of the Glenn Foundation archives.

The second underwrote expenses for team members attending Gastonia's first All-America City competition since 1963 who could not afford the cost of the trip. While this effort was unsuccessful, it served as a dress rehearsal for future triumph.

Celebrating Twenty-Five Years

At the October 1997 board meeting, a special guest was the Rev. Dr. David C. Stoker, the new senior minister at First Presbyterian Church. On December 12, in celebration of twenty-five years of grantmaking, the foundation hosted a luncheon at the Gaston Country Club for current and former trustees and included as guests David Stoker, Linda Dixon, and Jick Garland, now mayor of Gastonia. Everyone enjoyed a delightful lunch, fellowship, and shared memories.

New officers for 1998 were Dan Moser, chairman; Liz Sumner, vice chairman; and John Corbett, secretary-treasurer. Jim Stuart, Alex Hall,



L. to r., facing clockwise: Hugh Bryant, David Wright, Alex Hall, Craig Fielding, Dan Moser (standing), Jennie Stultz, Judy Miller, and Lonnie Waggoner. Courtesy of the Glenn Foundation archives.

and Lonnie Waggoner rotated off the board, Jim for the last time. The board lost Jim's institutional memory and Alex's exceptional oversight of investment assets, which now exceeded \$8 million. As the new treasurer, John chaired the finance committee and oversaw the investments. In outgoing remarks, Lonnie said he would always remember how the trustees held open and honest conversations despite differences of opinion, and made excellent grantmaking decisions.

Lonnie's remarks underscored a truth that has rung out since the early days of the foundation. Trustees shared a mutual respect for each other and enjoyed the freedom to express their views openly and confidentially. The minutes reflect only a handful of instances when the board did not achieve unanimity in decision-making, but no hard feelings have followed a divided vote. When there have been differences, trustees have worked through them, trying in good faith to make the best decisions possible for the community. Bonding and camaraderie have usually come after new trustees have completed their first cycle of grant deliberations, when everyone has

become familiar with each other's personalities and perspectives. The foundation's board was smaller than most, but most trustees served consecutive six years. The pattern of term rotations resulted in three-year periods where board composition remained unchanged. Camaraderie grew, and meetings were frequently interspersed with laughter because the trustees were a compatible group and enjoyed each other's company while attending to the serious business of discerning the most worthy projects to fund.

At the end of the January meeting, three new trustees joined the board: George L. "Lud" Hodges III, Rev. Dr. David Stoker, and Jennifer Thomas "Jennie" Stultz. The three would serve two consecutive three-year terms. Lud Hodges was a Belmont native who worked for Crescent Resources, the real estate arm of Duke Power Company. He held a bachelor's degree in civil engineering from Georgia Tech and an MBA from the University of North Carolina at Chapel Hill. Married and the father of triplets, Lud was a member of First Presbyterian Church. His knowledge of real estate would become valuable to the foundation in a short period of time.

David Stoker began his tenure at First Presbyterian Church in March 1997. A native of Asheville and a graduate of the University of North Carolina at Chapel Hill, David received a master of divinity degree from Princeton Theological Seminary, in Princeton, New Jersey, and a doctorate of ministry from Fuller Theological Seminary, in Pasadena, California. David served pastorates in California, Washington, DC, and Jacksonville, Florida, before moving to Gastonia with his wife and three young children.

Jennie Stultz was a Gastonia native and part-time director of the Gaston County Education Foundation. After serving as a director of public and private preschool programs for seventeen years, she served as executive director of Keep Gastonia Beautiful for ten years, garnering local, state, and national awards of excellence. Jennie was a national trainer for Keep America Beautiful when she joined the board. She led Gastonia's All-America City delegation in 1997 and would do so twice more. Jennie was a leader at First United Methodist Church.

Grant Distributions: 1998

The board had \$275,000 to allocate, reviewed fifty-one applications totaling \$722,847, and funded thirty-two requests. Funds went to the Charlotte Symphony Orchestra Society for a summer Pops in the Park concert at the Gaston County Park in Dallas; Gaston Skills to renovate the former Lowe's home improvement store on Bessemer City Road into a comprehensive community rehabilitation program/sheltered workshop for persons with disabilities; and Gaston County Schools to help renovate Gastonia's historically black high school, Highland, saved from demolition by alumni and community advocates and soon to be transformed into the Highland School of Technology, Gaston County Schools' first magnet school.

A grant of \$40,000 went to Gaston Literacy Council toward a \$700,000 campaign to renovate the first floor of the Wesley Center, leased from First United Methodist Church, into new office space. Katie Jefferson had become the charismatic and energetic executive director of the Literacy Council in 1991 and quickly attracted an influential board of directors as she inspired them to address the problem of illiteracy. The new office on Marietta Street was close to the bus station and afforded greater visibility. With the expanded space and dedicated volunteers and staff, the agency accommodated many more students.

The board granted \$20,000 to a new agency called Gastonia Potters House, a Christian-based residential recovery center for women suffering from substance abuse, started by Cindy Marshall-Hope. Cindy was a former substance abuser who found rehabilitation and rebirth at Hebron Colony and Grace Home. Now a certified substance-abuse counselor, she had written a letter of support when the Boone-based rehabilitation center applied for a Glenn Foundation grant in 1993. Through Gastonia Potters House, Cindy was determined that other women should experience the same transformation she had experienced.

A grant of \$20,000 provided start-up funding for Gaston Together; bought the Miss Twiggy tree costume for the Keep Gastonia Beautiful Educational Tree Program, designed to entertain and educate second-graders about the purpose and benefits of trees; and funded an after-school remediation program in reading and math to low-performing students at Woodhill

Elementary School. In 1998, almost half the grants and half the dollars went to education or training programs.

Moving Home

It was perhaps in the fall of 1998 that Caroline notified the board of her intention to retire effective June 1999, allowing time to find her replacement. The trustees decided not to post a notice of the impending vacancy and risk opening floodgates to potential applicants. They encouraged Caroline to quietly ask around to identify potential candidates.

That fall, the administrative wing of the church, where Caroline's office was located, began undergoing renovations to create more offices for staff. After eight years of hosting the foundation, the church needed her office. Caroline vacated with the help of her two high school football-playing grandsons, Harris and Parks Lineberger, who moved records, file cabinets, and equipment to a spare bedroom at Caroline's home. They boxed up and stored other records at the church. Caroline had the foundation's telephone number transferred to her home telephone, but the foundation continued to use the church's address and meeting facilities. Caroline had enjoyed her association with the church staff, but for the next year and a half, she ran the foundation from the convenience of her home.

At the November 1998 board meeting, trustees elected Liz Sumner chairman; Dub Dickson vice chairman; and John Corbett secretary-treasurer. They would begin their terms at the end of the first meeting of the following year. They, along with Lud Hodges, Alex Hall, Jennie Stultz, and David Stoker, were the board that would secure Caroline's successor.

CHAPTER 8

Changing of the Guard

1999–2001

In December 1998, Caroline Garrison and Barbara Voorhees, executive director of United Way, attended the welcome reception for Karen Andrews, the new mental health director, at the City Club of Gastonia. The two had known each other for almost two decades, starting in the early 1980s, when Caroline served on the search committee that hired Barbara as the United Arts Council's first executive director. Their friendship grew when Caroline became executive director of the United Way and hired Barbara to fill her former position as communications director. They had maintained their friendship when Caroline served as the Glenn Foundation administrator and Barbara as fund development coordinator for the Alliance for Children & Youth, where she had written and submitted applications to the foundation before becoming the United Way's director.

Caroline told Barbara of her intent to retire and of the trustees' desire to keep the search low-key. Because of Barbara's many contacts in the community, Caroline asked if she knew anyone who might be interested. To her own great amazement, Barbara raised her hand. The thought of working for the foundation had never occurred to her, but Barbara instantly knew that this opportunity would not open up often. She loved the Gaston community and had devoted many years volunteering for local nonprofit agencies. And she loved the United Way, but the job was all-consuming. She knew that working for the Glenn Foundation would enable her to work with a broader group of nonprofits and afford more flexibility. Part-time work was appealing.

Like many people who had heard about the Glenn sisters, Barbara had been intrigued from the time she first learned about the foundation in the late 1980s, wondering how Carrie and Lena Glenn managed to save almost \$3 million working as a schoolteacher and librarian. The story fascinated her.

Caroline reported Barbara's interest to incoming board chair Liz Sumner. Liz and the board were excited about the prospect and ceased the search. Barbara felt that she needed to give her board a year's notice, because leaving in June would not allow her successor time to acclimate to the United Way and the community before facing a fall fundraising campaign. For that reason, Barbara and the foundation had an informal understanding. Caroline delayed her retirement until the end of 1999, and Barbara completed her year. The work of the Glenn Foundation and the work of the United Way proceeded normally.

At the end of the January 1999 meeting, Dan Moser rotated off the board, and Alex Hall returned after a one-year absence. As outgoing chairman, Dan recalled, he had been reluctant to serve when asked, but had found his six years "very rewarding and the associations excellent!" When Liz assumed the chairmanship, she asked Caroline to prepare a list of duties for the future staff person along with any other appropriate information. Lud Hodges agreed to chair an ad hoc committee to secure office space for the new director when the time came.

Grant Distributions: 1999

The minimum distribution amount was \$378,000. Trustees reviewed forty-seven applications totaling \$839,711.80 and funded thirty-six of them. One grant funded a position at Gaston Hospice to provide grief education, lead support groups, and train community bereavement volunteers. Another grant went to Advocates for Healthy Citizens for operating support for a new community health center in Bessemer City. Still another went to Catawba Lands Conservancy to help the agency acquire and permanently preserve land in the Mountain Island Lake watershed, source of water to Mount Holly, Gastonia, and Charlotte-Mecklenburg. Protecting the land was critical to the safety of water quality and natural heritage in the growing Charlotte region. The conservancy had started earlier in the decade to



The unique playground at Martha Rivers Park was a project of Gaston County Medical Society Alliance, but it grabbed the attention of the entire community. The trustees were so impressed by its value to children and families that they granted \$10,000 more than the \$15,000 request in 1999. Courtesy of the Glenn Foundation archives.

protect land in a six-county area including Gaston County, and its first conservation easement in 1995 was the preservation of Redlair Farm and Forest in the northeastern part of the county. Redlair was home to the rare big leaf magnolia and the federally endangered Schweinitz's sunflower.

A grant to the Gaston County Medical Society Alliance helped fund the once-in-a-generation Operation Playground project, a \$300,000 safe, innovative playground for Gaston County children of all ages and abilities, at Martha Rivers Park, in Gastonia, designed by Leathers Associates of Ithaca, New York. The trustees found the request so appealing because of its impact on the quality of life for children and families that it granted \$10,000 more than the \$15,000 request.

1999–2001 Strategic Plan

When the grant process was completed, the board developed a strategic plan for 1999–2001. Among the goals was developing an image plan for Gastonia and Gaston County, continuing to support youth volunteerism,

making the application more user-friendly for applicants, providing strong leadership for the future of the foundation, formulating a comprehensive plan for future staffing and office location, and developing a comprehensive communication plan that would include an annual report.

A priority was creating the image plan for Gastonia and Gaston County. The county's image suffered regionally, as it was known for textile mills, fish camps, and low educational attainment. The name Gastonia was often likened to a stomach disorder, and Gastonia frequently was the butt of jokes by Charlotte radio stations. The Gaston Together group, led by executive director Pam Youngblood, envisioned the initial phase of the image campaign as a celebration of Gaston's strengths, enhancing awareness of the quality of life Gaston citizens enjoyed, demonstrating community pride, and expressing Gaston's uniqueness. A later phase would address negative perceptions of the city and county regionally. In July, the foundation established a relationship with Gaston Together to fund a marketing campaign called Promote Gaston, and the group began drawing up an agreement.

A New Hire

Caroline's hours had expanded over her tenure, and in July 1999, she recommended that her successor hold the title of executive director and that the hours increase to twenty a week. She based her recommendation on her desire to have had more time for site visits and to assist applicant agencies, especially those with limited staff. Caroline developed a new job description based on her almost nine years of on-the-job experience.

On July 28, 1999, the board met with Barbara at the Gaston Country Club to discuss the position of executive director, and hired her as an independent contractor for twenty hours a week beginning January 15, 2000. The position became that of an employee on advice from Cherry Bekaert & Holland. Caroline remained a consultant through March 31, 2000, to ensure a smooth transition, while Barbara served as a consultant to the new United Way director through April 30, 2000.

During Caroline's nine-year tenure, the board refined a number of practices in the areas of finance, administration, and grantmaking, and began new initiatives. All of the practices molded the modern Glenn Foundation.

Between 1991 and 1999, when she retired, Caroline processed 577 requests for application forms and 428 applications, and managed nine grant cycles in which the board made 285 grants of over \$2.2 million.

A New Office

On election day in November 1999, trustee Jennie Stultz, running on the campaign slogan “City Wide City Pride,” was elected the first female mayor in Gastonia’s 122-year history. That same day, after Caroline, Lud, and Barbara looked at several potential offices, the three located a four-room suite at 1552 Union Road, Suite D, in the Union Commons office complex. It became the foundation’s first free-standing office. Since both the trustees and church leaders anticipated the foundation’s eventual return to First Presbyterian Church, the board asked that office furniture complement furniture the church purchased following renovations there. Barbara began her work at the foundation before the furniture arrived.

Barbara Voorhees was a native of upstate New York and the daughter of a Presbyterian minister. A graduate of Hartwick College in Oneonta, New York, she also held a master’s degree from the Maxwell School of Citizenship and Public Affairs of Syracuse University, both degrees in history. She moved to Gastonia in 1968, when her husband, Richard L. Voorhees, joined the law firm of Garland Alala Bradley & Gray, and Jick Garland became his mentor. Their daughter and son were born in Gastonia.

Barbara had led six successful United Way campaigns that raised over \$19 million for member nonprofits, thanks to exceptional volunteer leadership. In addition to her work with the United Way and United Arts Council, Barbara worked briefly as assistant to the dean of the graduate school at Queens College, in Charlotte, attended law school for a year, and for two years worked as grant writer for the Alliance for Children & Youth. She was familiar with nonprofit administration and financial management, was friendly with many agency directors, and knew the Gaston community.

She had already chaired a number of community boards, including the Junior League of Gaston County, Gaston Community Action, Department of Social Services, and the Board of Elections. She was a founding member of Partnership for Children of Lincoln & Gaston Counties, and Gaston



Barbara H. Voorhees, who served as the first executive director, led the foundation from January 2000 to June 2017. Courtesy of Barbara H. Voorhees.

Together: Communities of Excellence. She would go on to become president of the Rotary Club of Gastonia, chair the board of trustees of Gaston College, and serve as a member of the Wachovia local advisory board. She was an active member of First Presbyterian Church as deacon and elder and would serve twice as clerk of session. At the time of her employment, she wrote a monthly column called “Carolina Voices” in the *Gaston Gazette*.

One of the earliest phone calls Barbara received after settling into her new position came from George Winecoff, a longtime Voorhees family friend, who related his memories and interactions with the Glenn sisters at the time they established the foundation. His call was followed by a visit from attorney Roy Short Jr., who shared stories of growing up next door to the Glenn sisters on South Chester Street. Barbara took notes.

Promote Gaston Initiative

At the January 21, 2000, board meeting, trustees reviewed and formally adopted an agreement with Gaston Together for the Promote Gaston Campaign: Celebrating Gaston as a Great Place to Live, Work and Play. The Community and First Gaston foundations became partners to fund this initiative. Although they made it optional, the board sent the Promote Gaston guidelines to agencies requesting the foundation’s 2000 application form in order to stimulate requests that promoted the quality of life in the county.

By now, grantmaking took on three forms: traditional grants awarded to applying agencies using the application form and reviewed after the March 1 deadline; discretionary grants made at the pleasure of the board to

fund emergency responses or special opportunities that might arise within or outside the traditional grant cycle, usually by a letter; and collaborative projects to meet larger community needs. The Promote Gaston campaign was the first project where three local foundations provided financial support for a predetermined project.

Dub Dickson and Liz Sumner's terms expired at the end of the January meeting. Dub had served for twenty-four years and would not return to the board. In his closing comments, he marveled that when he became a trustee in 1975, assets were under \$20,000, but were now \$8.47 million. Liz remarked on the uniqueness of the foundation, how it was small enough to support the needs of small organizations whose programs might otherwise fall through the cracks, and large enough to be a leader among other local foundations.

Incoming chairman Alex Hall, by now a veteran of board service, began the first of his four consecutive years as board chairman. As he assumed his new role, and based on his previous experience, Alex observed that one strength of the foundation was the openness with which the trustees worked together.

To succeed Dub and Liz, the board elected Caroline Garrison and Ernest Sumner, who was vice president of human resources of A. B. Carter Inc. Remaining officers were David Stoker, vice chairman; Caroline Garrison, secretary; and John Corbett, treasurer. As Caroline transitioned from her role as administrative associate to that of trustee, she framed the Glenn sisters' 1973 letter to Jim Stuart to hang in the new office, and the foundation framed Carrie's and Lena's graduation pictures from the Normal. The board presented Caroline with a monetary gift as thanks for her faithful service.

Ernest was the oldest of Harold Sumner's four sons. Before the end of his term, he would become the first trustee to simultaneously serve on the boards of the Glenn and Community foundations. A graduate of Wofford College, he had a long history of community service, as chair of the United Way campaign, where he worked with both Caroline and Barbara; as president of the Gaston Arts Council and the Schiele Museum; and on the boards of the Gaston County Education Foundation, American Red Cross, and Salvation Army Boys and Girls Club. Ernest was a faithful member of First Presbyterian Church as an elder and deacon. He would become

president of the Community Foundation of Gaston County in 2010, which in 2019 changed its name to Gaston Community Foundation.

Grant Distributions: 2000

In 2000, a record ninety-eight agencies requested applications, and sixty applied, giving Barbara rapid-fire, on-the-job training in grants administration. The board awarded forty-one grants and expended \$429,730, the largest allocation in the foundation's first fifty years. The leading grant of \$32,000 supported the position of executive director of Unity Place at the former First Baptist Church on Franklin Boulevard. Unity Place was an innovative partnership uniting religion (historic St. Stephen's AME Zion Church, which was moving from the Highland community) and the arts (Gaston Arts Council and its affiliates). The building was being renovated to benefit all participants. Following First Baptist Church's move to a new building on Union Road, there had been talk of tearing down the historic Mission-style church built in 1922. It was saved from destruction through the advocacy of local businessman Richard B. "Skip" McPhail Jr. and preservationist Lucy Penegar, and the philanthropy of Daniel Jonathan Stowe.

The second largest grant, of \$23,000, went to Connect Gaston, a non-profit working with the City of Gastonia to establish the Avon/Catawba Creek Greenway, the city's first, connecting Lineberger Park on Garrison Boulevard to the National Guard Armory on Hudson Boulevard. The grant provided funds to open an access to the Shannon neighborhood located along the trail. Within seven years, the greenway became a leg of the Carolina Thread Trail, a fifteen-county regional initiative to conserve natural resources and enhance quality of life for citizens.

The board granted \$20,000 to the building fund of Third Street Presbyterian Church. The church had originally been located on Third Street in the Highland community before the city changed the street name to Page Avenue in the early 1900s. In the mid-1990s, the City of Gastonia and Gaston County made a land swap. Gastonia gave Gaston County land it owned on Long Avenue and Marietta Street (Dr. Martin Luther King Jr. Way) north of the railroad tracks, and Gaston County gave the City of Gastonia the 1911 courthouse adjacent to city hall. The county completed

a new courthouse on the property in 1998 and a new jail and jail annex in 1999, but the church was being displaced by a parking lot for the new facilities.

For four years, the Third Street congregation met on Sunday mornings at the Erwin Center in the Highland community as they raised funds for their new building. Using John Corbett's Golden Rule, the trustees found this Presbyterian cause more compelling than their concern for breaking the rule about bricks-and-mortar projects.

A \$5,000 grant went to the Piedmont Chapter of the Links, Incorporated, to commission an original mural by Gastonia native John Biggers for display indoors in a public place. Then in his 70s, Biggers had grown up in the Highland community. After receiving his bachelor's, master's, and doctoral degrees from The Pennsylvania State University, he became the founding chairman of the art department at Texas State University for Negroes (Texas Southern University). Biggers was an internationally known artist and muralist, and his works incorporated Southern folk traditions and African themes. This grant became more significant over time.

During the grant process, the National Civic League named the City of Gastonia one of thirty finalists for All-America City honors for the second time in three years. The board made a discretionary grant of \$4,000 to help pay expenses of participants whose stories were important to the presentation but who could not afford the cost of the trip. Still a trustee, Mayor Jennie Stultz led a delegation, Barbara included, all decked out in hard hats and reflective vests in keeping with the theme "Building Community." The presentation featured Unity Place; the efforts of staff and volunteers at the West Gastonia Boys & Girls Club to teach and mentor some of the city's most disadvantaged children; and Gaston Literacy Council's adult literacy programs—all programs the foundation supported financially. Gastonia came away as one of ten communities named a 2000 All-America City before the Promote Gaston campaign even began.

Changes to Grant Policies and Procedures

When the 2000 grant process concluded, the board reviewed policies and procedures and formally adopted five.

- 1) It approved an agency agreement report form that formalized conditions of grant awards. The form required signatures from a recipient agency's chief professional officer (executive director) and chief volunteer officer (board chair).
- 2) It reaffirmed its policy on geographic location, restricting grants to Gaston County agencies or to out-of-county agencies whose programs or services served Gaston County citizens. While exceptions to this policy have occurred occasionally, it was not realistic to expect the foundation, with its limited dollars, to support the needs of hospice agencies, boys and girls clubs, or crisis assistance agencies in other counties when local agencies provided similar services and needed support.
- 3) It adopted grant categories used by the Southeastern Council of Foundations that were broader than the four traditional categories listed in the trust indenture and used since 1972. The new categories conformed to the foundation's actual allocation of funds: arts and culture, children and youth services, civic, education, environment, health and science, human services, and religion. The new categories also provided a more accurate picture of grantmaking for questionnaires the office received from foundation research organizations.
- 4) It formalized a policy confirming its desire to give to Presbyterian causes, but only to those linked to Gaston County.
- 5) It added to the application form a question tied to Gaston Together's Promote Gaston initiative: "How does this program enhance the quality of life in Gaston County?"

Not long afterward, the board adopted additional policies. The trustees agreed that the foundation would not support umbrella campaigns, such as those of the United Way and Gaston Arts Council, which they believed relinquished to another entity their responsibility to select grant recipients. The board also agreed that the foundation would not become a permanent part of an agency's budget; would consider funding an agency staff position for one year even though the position would be needed for a longer time; did not ordinarily consider capital campaigns, but would consider requests on a case-by-case basis; would consider multiyear funding requests one year at a time; and did not give planning grants.

Civic Pride

Becoming an All-America City was just one element that boosted civic pride. The new courthouse shone on the northwest corner of Long Avenue and Marietta Street (Dr. Martin Luther King Jr. Way), and now a new Department of Social Services building (Health & Human Services) graced the northeast corner. BB&T's new main branch building opened on the southeast corner of Franklin Boulevard and South York Street, its brick pattern complementing the façade of its neighbor, Unity Place.

Highland School of Technology, which opened in July 2000, was a showplace. The board granted \$20,000 in both 1998 and 1999 for equipment and staff development. It became a National Blue Ribbon School, and has consistently led the county high schools with an exceptional graduation rate.

Yet downtown Gastonia was not attractive and the county was not thriving, even though the Norfolk Southern railroad tracks that ran through the center of Gastonia had been lowered in 1992 to make north-south travel through the city more convenient. Once located in the heaviest manufacturing congressional district in the country, Gaston's economy still suffered



Gastonia's first African American high school, Highland High School, began awarding diplomas in 1931. In the late 1990s, it was saved from the wrecking ball through the advocacy of alumni and community leaders, and after substantial renovations became Highland School of Technology, Gaston County's first magnet school. Two grants for \$20,000 each, in 1998 and 1999, helped pay for equipment and staff development. Courtesy of Highland School of Technology.

from the loss of manufacturing jobs due to plant closings and layoffs, and some manufacturers moved production offshore to take advantage of cheaper labor. Businesses associated with textiles suffered as well. Trustees hoped the Promote Gaston campaign would go a long way to boost the spirits of Gaston's citizens and attract new businesses to the area.

In June 2000, on one of the hottest days of the year, Barbara and Caroline explored Oakwood Cemetery, locating the Glenn coping and the headstones of Carrie and Lena; of their parents, William and Sarah Priscilla; and of their siblings Ernest, Howard, Eula, Annie, and Gertrude. The family members lie less than three blocks from the site of the South Chester Street home where Carrie and Lena lived for close to sixty years. Six miles south of the cemetery, the Glenn homestead, where the children grew up together on the family farm, still stands on a promontory along US Highway 321 South.

Promote Gaston Campaign

Sherry Shaw succeeded Pam Youngblood as executive director of Gaston Together and hired Donna Lockett to implement the Promote Gaston campaign. By September, the campaign was in full swing and attracted positive publicity for such events as a school employee appreciation day; pulpit swaps; monthly minister breakfast meetings; Take One: Community Pride photo contest and exhibit, where citizens entered photos of their favorite places in the county; a televised electronic town meeting hosted by William C. Friday, a Dallas, North Carolina, native and president of the University of North Carolina system; and the Pride in Gaston school program for third-graders, including the Proudest Kid in Gaston County essay contest, a staple of Gaston Together's plan of work. As part of Promote Gaston, Gaston Together developed a website initiative called NeighborNets to give county nonprofit organizations, including the Glenn Foundation, an inexpensive presence on the web. The campaign also brought to the county such inspirational speakers as pastor and author Tony Campolo; Wally Amos, creator of Famous Amos cookies; Rudy Ruettiger, hero of the inspirational movie *Rudy*; and radio and television personality Art Linkletter. These presentations drew large audiences. The foundation granted \$100,000 to the Promote Gaston campaign over two years.

Record-Keeping

Over her first summer, Barbara began reading board minutes, beginning in 1972, to learn about the foundation's history. The minutes contained information about how the foundation began and of the early grants, and were a goldmine of interesting information for a history major who was also plugged into the Gaston community. Barbara created records of grants awarded from 1972 to 1986, and then read every application from 1987 forward. She continued the record-keeping that Linda Dixon and Carolina Garrison had established, including the names of applicant agencies, location, and categories, but added summaries of each request along with the amounts requested and granted. During this process, she reclassified earlier applications to conform to the new grant categories the board had approved. She continued this project for many summers until the records were current. She also developed a running list of trustees and their dates of service.

After the board formalized its new grant policies, Barbara updated the information that Judy Miller had recorded in 1991 and expanded it to include financial and administrative policies gleaned from the minutes. This information became the first policy manual, and the board adopted it in October.

Reallocations and Recognition

After the 2000 grant cycle ended, the trustees were surprised to hear from four different recipient agencies, one from 1999 and three from 2000. These agencies requested permission to either extend expenditure of their grant funds to a new fiscal year; or, having used the funds for the intended purchase, had money left over and want to reallocate it for a purpose in line with the original request; or, due to a change in circumstances could not carry out the program as proposed. This issue had arisen years earlier, but these were different trustees, and there had not been so many requests before. The most prominent of the new requests came when Gastonia city manager Danny Crew shared the news that the families in the Shannon neighborhood opposed an access from the Avon/Catawba Creek Greenway trail. Crew offered a greenway pedestrian bridge as an alternative use of funds, and the board accepted. The pedestrian bridge, located on the



With funds granted in 2000, the Carrie E. and Lena V. Glenn Foundation Bridge became the first pedestrian bridge on the Avon-Catawba Creek Greenway. In an August 2002 photograph pictured here, the bridge was raised following a trial placement so workers could make final adjustments to the foundation. Courtesy of the Glenn Foundation archives.

south side of Garrison Boulevard across from Lineberger Park, reads: “The Carrie E. and Lena V. Glenn Foundation Bridge.”

The board allowed all requested changes but documented them for the files and provided oversight to assure that the agencies spent reallocated funds as proposed.

On October 24, Alex Hall and Barbara attended the Regional Millennium Celebration of Human Rights sponsored by the Human Relations Commissions of Gaston County and Charlotte-Mecklenburg. On behalf of the foundation, Alex accepted the Decade of Gems award.

Two Legal Opinions

That same fall, Gaston College requested funds to support a statewide university and community college bond referendum on the November 2000 ballot. After seeking legal advice from James Sweeney, legal counsel for the

Southeastern Council of Foundations, the board denied the request after learning that a bond referendum “is in the nature of legislation, and private foundations are not permitted to support or oppose legislation.” The board also sought legal advice about soliciting contributions from the public. It learned that nothing prevented the foundation from accepting contributions from third parties so long as the foundation did not receive one-third of its support from outside sources. In the unlikely event that happened, adverse tax consequences could trigger a conversion from a private to a public foundation.

2000 Southeastern Council of Foundations Conference

The Southeastern Council of Foundations Conference took place from November 8 to 10, 2000, in Orlando, Florida, with all trustees and Barbara in attendance. It turned out to be a momentous week. On Monday, November 6, Susan Love Glenn, of Lincolnton, Carrie and Lena’s attentive niece, died at Sharon Towers in Charlotte at the age of 88. For many years, she had been the foundation’s closest link with the Glenn family. On Tuesday, November 7, the presidential election took place as the trustees flew to Orlando (they had voted absentee). On Wednesday, November 8, the delegation awoke to the news that the election hinged on results from Florida, the very location of the conference. “Hanging chads” became a household term as the outcome of the election between George W. Bush and Al Gore made a recount necessary before Bush was declared the winner.

The conference was informative as always. Since all trustees were now attending and sharing presentations of interest after the various sessions, the board dispensed with the December meeting, when they usually discussed the presentations.

Grant Distributions: 2001

In March 2001, the foundation experienced a loss of assets due to an unexpected market correction. It did not affect the minimum distribution, which was calculated from September 30, 2000, and it certainly did not affect the number of applications. The foundation received 166 requests, and 84 agencies submitted applications, both record-breaking numbers.

The board had been requesting nine copies of application materials for several years, seven for the trustees, one for Barbara, and one for the permanent file. Applications overtook every bit of space in the four-room office. It was another busy time as Barbara studied every application and prepared summaries for the trustees. The board allocated \$403,877 to forty agencies.

A large grant went to Habitat for Humanity, which had been started in 1988 by Johan Newcombe, a community volunteer, and Becky Carter of the Community Foundation. It operated initially out of the Community Foundation's office but had built an office at 609 Second Avenue and opened a ReStore thrift store to raise money for home-building activities. A 2002 grant funded the salary of the first paid store manager, which enabled the ReStore to stay open five days a week and led to it becoming a permanent, self-sustaining fundraiser for the agency. Grants went to Gaston County Special Olympics and to Covenant United Methodist Church for its Hispanic worship center. A grant helped Flynn Fellowship Home fund new floors and carpet.

An important grant to Belmont Abbey College partially funded Promoting Gaston County's Natural Heritage, environmental education programs for children and adults, as part of a fourteen-month celebration of the life and works of French botanist André Michaux. In 1795, when Carrie and Lena's ancestor John Glen was 69 and living near Mill Creek, Michaux had journeyed in the area, identifying the flora of the region, including the big leaf magnolia.

An innovative grant of \$10,000 funded a curriculum-integrated pilot program of arts-based instruction at Ida Rankin Elementary School in Mount Holly, Gaston Arts Integration Nurtures Success (GAINS). It was a partnership among the Blumenthal Performing Arts Center in Charlotte, Gaston County Schools, United Arts Council, and Gaston County Public Library. Knowing that children learn differently, the organizations hoped that incorporating the arts into the traditional course of study might provide a more inspirational learning experience. Trustees were concerned that the program might not be sustainable, but they felt their commitment was worth the risk. The foundation's grant helped the Blumenthal draw down a \$10,000 match from the North Carolina Arts Council. After

two years, students at Ida Rankin led all county elementary schools with 97.5 percent end-of-grade test scores, and the GAINS program was thought to be a contributor to this success.

The Gaston County Public Library had received a grant from the Bill and Melinda Gates Foundation to purchase computers for qualifying low-income branch libraries, but library branches in Belmont, Lowell, Stanley, Union Road, and the children's library at the main branch were ineligible to receive funds. A grant of \$8,000 enabled the library to purchase almost all the remaining computers needed. A final grant worth noting went to Art I Gallery for a program called "Natural Roots," presented by Gastonia native and naturalist Eustace Conway, founder of Turtle Island Preserve, in Watauga County, North Carolina. It included a photography exhibit, lectures, presentations for schools and other organizations, and art and photography workshops focusing on the contemporary natural environment.

Banking Representative

The terms of Alex Hall and John Corbett were set to expire in 2002, and thinking ahead, the trustees realized that Alex was eligible for reelection to a second term, but John had completed two three-year terms and, according to the bylaws, he needed to rotate off for a year. Term limits had been observed since 1986 as the foundation began receiving the proceeds of Carrie's and Lena's estates. When John had been contacted to serve as BB&T's representative, however, he was told term limits did not apply to the church and banking positions, a misinterpretation of the trust indenture and bylaws. He was confused. To accommodate the misunderstanding, the board amended the policy manual and the bylaws and by unanimous vote exempted the bank and church representatives from term limits.

In August 2001, when the nominating committee selected officers for 2002, the members reviewed a section of the trust indenture that read: "no trustee may serve more than two consecutive full terms of three (3) years each unless one year has elapsed since previous service." That had been the board's standard practice since rotation began and was intended to allow different representatives from the church and bank to serve on the board. Based on this section, the committee considered that John should rotate off

for one year after all. John, however, found that the committee's position contradicted the new policy and bylaws revisions. In seeking a solution, the nominating committee offered John an unprecedented third term.

When the trust indenture was adopted in 1971, the Citizens National Bank was the primary local commercial bank in Gastonia, and its trust department provided the talent pool for the bank officer's position. Many changes occurred in the ensuing years, as Citizens National became Independence National, and BB&T became the successor bank to Independence National. BB&T's trust department and other of its banking operations had long since moved to Charlotte, limiting the local pool of officers for service to the foundation.

2001–2003 Strategic Plan

The terrorist attacks on September 11, 2001, brought about fear, patriotism, and eventual war with Iraq. Prayer services were held across the county. As a result of this event, Jews, Muslims, and Christians in Gaston County joined together to begin the Gaston Interfaith Trialogue to promote interfaith understanding.

In November 2001, as the board wrestled with the unsettling problem of how to comply with the trust indenture, it held a strategic planning session at BB&T's board room with all trustees present. Martha Burris served as facilitator. The trustees were pleased to have met the goals set in 1999. They crafted the first mission statement: "To support the charitable spirit of the Glenn sisters by helping people in need in our community through grants for religious, health, educational, and community needs." Following the review, the board adopted a seven-goal, 2001–2003 long-range plan. They agreed that the first three goals were immediate priorities:

1. To implement a policy for recipient accountability.
2. To learn and understand grantmaking regulations.
3. To review compatibility of the trust indenture with policies and procedures.

Addressing the first goal, a policy for recipient accountability, would place in writing a concern of the trustees from the foundation's earliest days. The second goal responded to an increased number of questions the

board had about the operation of an indentured trust. Most trustees had experience serving on boards of nonprofit corporations, where the law provided clear guidelines for governance and operation, but the seven were uncertain about laws applying to an indentured trust. The third goal addressed the banking-officer dilemma, which Alex offered to discuss with Jick Garland. The following day, John Corbett resigned from the board.

Barbara contacted David Wright for names of other Gastonia banking officers who would be eligible to represent the bank. David recommended two who fit the board's criteria, but both declined, citing existing commitments. With no local bank officer willing to serve, the board faced the prospect of remaining out of compliance with the trust indenture indefinitely or amending the document. They chose the latter, thus beginning a four-year process of changing the foundation's legal identity from an indentured trust to a nonprofit corporation.

CHAPTER 9

The Petition

2002–2003

Entering 2002, the trustees happily looked forward to celebrating the foundation's thirtieth anniversary with a different kind of commemoration from the twenty-fifth. Rather than a luncheon, they chose several small observances culminating with a big announcement on March 29, 2002, the thirtieth anniversary of the first board of trustees meeting.

On March 6, 2002, Barbara's "Carolina Voices" column, "A Remarkable Family Leaves Legacy in Gaston County," briefly told the story of the Glenn family. The following week, the trustees presented a program about the Glenn family and the foundation to the Rotary Club of Gastonia, since almost half the trustees since inception belonged to this club. Hugh Bryant and Judy Miller attended as special guests and were recognized as founding trustees.

On March 29, 2002, a *Gaston Observer* story announced the thirtieth anniversary gift to United Way of Gaston County, which honored the Glenn sisters' love of community. The headline read, "Frugal Sisters' Nest Egg Pours \$100,000 into United Way." Continuing losses in the manufacturing sector had led to losses in workplace campaigns, which had created a significant shortfall in pledge collections. The Community Foundation made a gift of identical size, and both gifts were timely and needed. Although foundation assets dropped after the market reversal in March 2001, the trustees held firm, granting the contribution from the corpus.

The foundation's two-page advertisement in the *Gaston Gazette*, "Proud to Serve Gaston County," included a biography of the Glenn sisters,

ON ITS 30TH ANNIVERSARY

Frugal sisters' nest egg pours \$100,000 into United Way

Glenn Foundation's largest gift eases strain on umbrella charity

BY DAVE BAITY
Staff Writer

GASTONIA — To celebrate 30 years of presenting grants to local human service agencies, trustees of the Carrie E. & Lena V. Glenn Foundation on Thursday announced a \$100,000 gift to the United Way of Gaston County.

The grant is the foundation's largest one-time contribution.

Foundation board Chairman Alex Hall said trustees decided making a substantial gift to a local charity would commemorate the giving spirit of the Glenn sisters, who didn't make much money but amassed nearly \$3 million by living frugally and investing wisely.

Trustees delayed announcing the United Way gift so it would coincide with the anniversary of the foundation's March 29, 1972, organizational meeting.

SEE GLENN | 4L

Carrie Glenn

■ Born in 1884; earned an associate degree in art at the old State Normal and Industrial College for Women in Greensboro

now UNC Greensboro, in 1906, and taught for several years in Gastonia primary schools.

■ Earned a bachelor's degree at George Peabody School of Education at Vanderbilt University in 1916 and a master's degree in 1929. Retired as an elementary education supervisor in the local school system



Lena Glenn

■ Born in 1886; graduated from the old State Normal with a degree in pedagogy in 1908; taught in Greensboro and Gastonia schools, then went to work at the Gaston County Public Library.

■ After earning a master's degree in library science at Emory University School of Library Science in 1920, she returned to her library job and retired as a cataloger.



The Foundation

The foundation they created makes grants to Gaston County organizations and groups outside the county that have programs that benefit Gaston County residents. Grant application forms are available at the foundation office, 1552 Union Road, Suite D, and deadline to apply is March 1 each year. Barbara Voorhees, executive director, (704) 867-0296.

An article in the *Gaston Observer* announced the thirtieth anniversary gift to United Way of Gaston County. Courtesy of the Glenn Foundation archives.

excerpts from their 1973 letter to Jim Stuart, a list of trustees past and present, and the names of 167 grant recipients from 1972 through 2001. These charities had received 463 grants since inception for a total of \$3.8 million, an amount exceeding the original corpus. The framed advertisement hangs in the office conference room on permanent display. The May 2002 issue of *Interchange*, the monthly newsletter of the Southeastern Council of Foundations, announced the anniversary, and the winter 2002 edition of *Gaston*

Seasons, A Magazine Celebrating Gaston County featured the story of the foundation and the sisters.

The publicity surrounding the thirtieth anniversary resulted in three lasting contributions to the story of the Glenn family and the Glenn Foundation. The first was the unexpected delivery by Will Glenn's grandson, David Glenn Thompson, of Lincolnton, of the John Glen genealogy, a document that Barbara would find indispensable in writing the Glenn family's story over a decade later. David's periodic telephone calls with entertaining stories and information about his family continued throughout Barbara's tenure and added to her knowledge of the family. Again, she took notes.

The second contribution was a delightful conversation Barbara had with David's 84-year-old mother, Mary Glenn Thompson, Will Glenn's third daughter and Carrie and Lena's niece. She provided insight, anecdotes, and a wealth of personal observations about her family members and about growing up in Gastonia in the 1920s.

Finally, curiosity led Barbara to request the Glenn sisters' records from the archives of the University of North Carolina at Greensboro (the Normal), resulting in eighty-two items of correspondence and other documents that shed light on the educations of the five Glenn sisters between 1895 and 1915.

Others in the community also came forward to relate their Glenn family memories. Barbara continued making notes and kept all this information for the time when someone might write the Glenn family's story.

Amending the Trust Indenture

It would have been much easier to address the issue of noncompliance with the trust indenture had the foundation converted to a corporation in 1990, when Jick Garland originally suggested it. Faced with the dilemma about the bank representative, the board would only have had to amend the bylaws to rectify the problem. Now, Alex and Barbara discussed with Jick the ramifications if the foundation were unable to secure a BB&T representative. While the trust indenture named only a bank officer, it gave three options for the representative from the First Presbyterian Church. Jick noted that there was never any intention that one bank officer or one

church representative serve on the board without rotation. He believed the foundation's rotation policy was a good idea and within the intent of the trust document.

Jick also commented that the sisters never gave specific directions about institutions the foundation should fund. That section of the trust indenture was meant to provide general guidelines for types of giving. Also, Carrie and Lena never intended that money be restricted exclusively to Gaston County, but Jick did not think a Gaston County-only policy violated the document.

Jick suggested that if the trustees wished to change any portion of the trust indenture, they should review the entire document and send him a condensed version of all portions that were outdated or in need of revision. From these comments, he would draft questions to pose to the court through a petition, which was the only way the trust indenture could be amended. The trustees made reading the trust indenture their top priority.

Grant Distributions: 2002

Only six trustees tackled the 2002 grant process, with \$350,000 to distribute: Alex Hall, chairman; Ernest Sumner, vice chairman; Caroline Garrison, secretary; and Lud Hodges, treasurer, serving with David Stoker and Jennie Stultz. Amid deliberations that took place over several meetings, First Presbyterian Church was considering a building addition, and the trustees discussed advantages and disadvantages of free-standing office space versus space inside the church, with free rent and utilities. They agreed to pursue discussions while suggesting that the foundation have a separate entrance or at least visible exterior signage, but the addition never materialized.

The board funded thirty-two grants totaling \$359,425. Three grants went to purchase playground equipment for the City of Mount Holly, the Town of Ranlo, and Sherwood Elementary School in Gastonia. Another grant enabled Gaston County Schools to purchase a high-performance computer system to integrate all aspects of tracking students. The board funded a challenge grant for a shared youth director's position at Olney and Union churches, and a grant to Junior Achievement helped students



When Sherwood Elementary School was forced to remove its outdated playground equipment for safety reasons, PTA parents held fundraisers for two years and built three different age-appropriate playground areas. In 2002, the foundation contributed funds to purchase playsets for second- and third-graders. Pictured l. to r. at the ribbon cutting for the new play area: Jennie Stultz (Glenn Foundation trustee), Lisa Rhinehart, Dawn Collis and Debbie Rudisill of Sherwood's PTA, and Barbara Voorhees, the foundation's executive director. Courtesy of the Glenn Foundation archives.

learn about free enterprise, business, and economics to prepare them for the workforce.

The finance committee had met with the fund managers in even-numbered years, and so in August 2002, they met with David Wright and David Arthur, of BB&T; Michael Orkin, of Caldwell & Orkin; and Eric Gustafson, of Stein Roe & Farnham. Gustafson often appeared on CNN business reports. The mix of equities to fixed assets changed to 60 percent equities, 40 fixed. Since the market correction, Caldwell & Orkin had performed exceptionally well, and the committee pulled all grant funds from this account, simultaneously rebalancing the investments.

The Complaint

Throughout 2001 and 2002, Jick Garland struggled with treatments for lymphoma. Despite his illness, he drafted a complaint seeking declaratory relief, which the trustees reviewed at his office in September 2002. It was not unusual to seek a declaration of rights from the court, Jick explained, especially for a trust indenture over thirty years old. The defendant was North Carolina Attorney General Roy Cooper. Jick expected one of Gaston County's resident Superior Court judges to hear the case. He had already met with former trustee David Wright of BB&T's trust department to explain the action. BB&T did not contest it.

Jick prepared six questions to present to the court for a declaratory ruling:

1. Whether the board had the right to adopt bylaws.
2. Whether the board could incorporate the foundation into a non-profit corporation.
3. Whether the board should be required to keep an officer from BB&T on the board.
4. Whether the board may change the calendar year.
5. Whether the executive director may sign checks so long as a designated member of the board co-signs.
6. Whether Article VI naming The Citizens National Bank as Corporate Fiduciary, but not its successors and assigns, is still applicable.

Before filing the complaint, the board rescinded the bylaws amendment passed in January 2001 exempting the bank officer and church representative from term limits. Jick filed the complaint on October 24, 2002. He did not foresee an appeal.

News About Town

Until the court decided the issue of the bank officer, the foundation continued to operate with six trustees. Barbara's executive director's report noted the new North Carolina Network of Grantmakers that was established to support the state's foundations. The Community Foundation sponsored a new event called Run for the Money, a fundraiser for participating

nonprofit agencies, to celebrate its twenty-fifth anniversary in March 2003. Artist John Biggers had died unexpectedly in 2001, a year after the foundation's grant toward commissioning an original artwork from him, leaving the Biggers Mural Committee in a quandary. The group now contemplated re-creating a piece of Biggers's original artwork in mosaic tile.

Garland Center

On November 29, 2002, James Boyce "Jick" Garland lost his battle with lymphoma at the age of 82. Hundreds of people attended his memorial service and observed the procession through Gastonia from First Presbyterian Church to Oakwood Cemetery. Of the many clients Jick and his father assisted over the years, perhaps none was as longstanding as the Glenns, with an almost century-long link from 1908, when his father, Peter Woods Garland, helped Lucius Glenn secure the first charter for City Hospital. In his ten years as mayor, Jick promoted citizen involvement and regionalism. In 2001, for his distinguished service, the Gastonia City Council had named him mayor emeritus.

The 1911 courthouse had partially burned in 1998, and the City of Gastonia was renovating it to consolidate many city functions under one roof. Shortly before Jick's death, the city council voted to name it the James B. Garland Municipal Business Center. It was a well-deserved recognition of an exceptional public servant.

In January 2003, the fund balance had not fully recovered from 2001 when Jim Ratchford reviewed the financial statements. The minimum distribution dropped to \$204,348, the lowest distributable amount since 1995. Spending only the minimum distribution would help the foundation retain principal until the economy turned around, Jim suggested, but holding the line at that amount would trigger a 2 percent rather than 1 percent excise tax that foundations were required to pay annually. Paying 2 percent tax provided more savings to the corpus than paying out more in grants to save the extra 1 percent. Since the trustees were in the business of helping the community, they asked Jim to review the numbers before the end of their deliberations in May, hoping for an increase in what they might distribute. As it turned out, this time all grants were paid from the BB&T account, which rebalanced the portfolio among the three fund managers.

The board wanted to honor Jick's service. As they contemplated an appropriate memorial gift, Jennie Stultz, wearing her mayor's hat, let the board know that the Gastonia City Council wanted to create a display to honor his life at the new Garland Center but had no funding for the project.

Grant Distributions: 2003

The 2003 grant application deadline fell on a Saturday, leading the board to implement a new policy. When March 1 fell on a weekend, the deadline would be the Monday immediately following that weekend. The application deadline therefore was Monday, March 3, 2003, and another grant cycle began. The board approved thirty-one requests from seventy-four applications.

As the trustees came together with their preferences, all of them included Crisis Assistance Ministry in their top ten picks. Crisis Assistance Ministry met the sisters' criteria that money help indigent suffering persons, but since 1977, the foundation had made twenty-four consecutive grants totaling almost \$300,000, twenty-two for emergency assistance and two for Super Cupboard. The trustees had never intended that foundation grants should become a permanent line item in any agency's budget. After discussion, the board voted to phase out giving to Crisis Assistance Ministry over three years, granting \$15,000 in 2003, \$10,000 in 2004, and \$5,000 in 2005. The trustees knew they could not bind future boards to this decision, but it made no sense to cut the agency off without giving them time to plan. Barbara informed executive director Cathy Howell, while letting her know that her agency was welcome to apply for a purpose other than emergency assistance. The timing was good, since the agency raised \$38,670 through the Community Foundation's new Run for the Money event.

In this grant cycle, the trustees denied five requests for fifteen-passenger vans because of recent concerns about van safety. The board approved seed money for a new agency with an appealing mission called Interfaith Hospitality Network (Family Promise), to address the needs of homeless families with children. Partner churches would soon host families for a week at a time, and other churches would provide meals for them. During the day, agency staff arranged training, transportation, child care, and counseling services to help parents return to independence.

The foundation made a large grant to Loray Girls Home, near the Loray Mill, for its independent living program for teenage girls aging out of foster care who had no family support. It made another grant to Cornerstone Christian Center for staff training and salary increases to meet state licensing requirements. Gaston Dance used its grant to purchase and refurbish used scenery for its annual production of *The Nutcracker*. Gaston Residential Services furnished two apartments at a new group home for persons with developmental disabilities. First Presbyterian Church in Dallas used grant funds to help pay for a new roof.

The Garland family had agreed to donate items for a display at the Garland Center, and so the trustees approved a discretionary grant of up to \$10,000 to establish a historical display of Jick's life. The extra allocation raised 2003 distributions to \$214,226. The board requested that a plaque credit the Carrie E. & Lena V. Glenn Foundation as the contributor of the display and give details about Jick's work with the Glenn sisters.

Motion for Summary Judgment

Jick's law partner, Jack Drum, ably assumed the foundation's lawsuit following Jick's death. On January 28, 2003, Nancy Moore, a reporter for the *Gaston Gazette*, wrote a short article about the lawsuit, but it was hardly a newsworthy event to the general public. Attorney General Roy Cooper, the defendant in the case, filed an answer through Special Deputy Attorney General George W. Boylan.

Because the complaint was not contested, Jack prepared a motion for summary judgment to dismiss the case and avert a trial. He drafted affidavits for the trustees and for Barbara, justifying the six issues listed in the complaint, with all signatures notarized. The affidavits would aid the Superior Court judge who reviewed the case. Jack filed the motion on May 27, 2003. On August 18, resident Superior Court Judge Jesse B. Caldwell III granted summary judgment with consent of the parties, affirming as a matter of law that the board of trustees had the inherent right to adopt by-laws; the foundation could incorporate as a North Carolina corporation; a BB&T officer was no longer required to serve on the board; the foundation could change its fiscal year to another fiscal period; employees could sign

checks so long as a trustee also signed; and BB&T, the successor bank to the Citizens National Bank of Gastonia, did not have to be the foundation's fiduciary bank.

On October 21, 2003, the board approved forming a North Carolina nonprofit corporation and authorized Jack to apply for articles of incorporation. The application named Alex Hall, Caroline Garrison, George Hodges, David Stoker, Jennifer Stultz, and Ernest Sumner as incorporators, since they were the trustees who initiated the complaint. Jack filed the articles on December 29, 2003, and the secretary of state issued them the next day. The effective date was January 1, 2004.

The next step was securing IRS tax exemption, which, among other aspects, required preparing a three-year financial history and a new set of bylaws. Karen Walker, CPA, of Cherry Bekaert & Holland, worked on the financial information for Form 1023, the application for recognition of exemption. The board agreed that the corporate bylaws should conform to the trust indenture and existing bylaws as much as possible.

As the work of the foundation continued during this transitional period, an issue arose after the trustees had made funding decisions. During the 2003 grant cycle, Barbara had accepted an application from a new all-volunteer agency that was missing the letter of tax exemption. After receiving assurances that the letter would be in hand by the time deliberations were completed, the board awarded the grant. It was then that it learned that the agency had never applied for exemption, and so the grant could not be paid. The board adopted a new policy requiring an applying agency to have a 501(c)(3) letter of tax exemption in hand before March 1 to be eligible to apply.

Planning the Garland Center Display

Jennie and Barbara had met with city manager Ed Munn, Debby Key, and others of the city's engineering department to select the area for the historical display at the Garland Center. That led to Barbara's meeting with Ed Munn and three of Jick's four children—Woods Garland Potts, J. Boyce Garland Jr., and Rebecca Garland Morris (Charlotte attorney Elizabeth Garland Wren was unable to attend)—to discuss the display's contents. The

city recruited Ann Tippitt and Dave Shurbutt, of the Schiele Museum, to create the exhibit, since the museum was a facility of the City of Gastonia. The two asked for items with visual interest, not just papers or certificates.

Wrapping Up 2003

The terms of Lud Hodges, David Stoker, and Jennie Stultz were expiring. At the fall board meeting, the trustees elected the Rev. Patrick H. Perryman, associate minister at First Presbyterian Church since 2000, as the church representative to fill John Corbett's unexpired term, restoring the board to seven trustees. Patrick grew up in Florida, graduated from Eckerd College, and held a master's of divinity degree from Columbia Theological Seminary in Decatur, Georgia. He was a doctor of ministry candidate at Fuller Theological Seminary in Pasadena, California. For the record, Patrick did an impressive imitation of Elvis Presley.

With Patrick, the board also elected three new trustees: Martha D. Eddins, Malinda B. Lowery, and Richard E. Rankin Jr. With four new members, the board postponed a planning retreat until after the 2004 grant cycle, knowing that grant deliberations gave new trustees knowledge of community needs, the operation of the grant process, and a chance to know each other better.

At the October meeting, one of the last items on the agenda was Malinda Lowery's request for a contribution to a project of the Gastonia, Gastonia East, and Gaston Breakfast Rotary clubs. She was chairing a committee to build a pavilion in downtown Gastonia to celebrate Rotary International's centennial in 2005. Rotarians believed that an impressive new landmark downtown would serve as a stimulus for downtown revitalization.

The clubs had secured a site downtown at the north end of South Street, in front of the Norfolk Southern railroad tracks that had been lowered in the early 1990s, and awarded the construction contract to Pinnix General Contractors. The deadline for the fundraising campaign was January 30, 2004. There had been pushback by naysayers about the wisdom of building a new structure in a so-called dying downtown that looked like it had been dropped in the middle of a parking lot. For that reason, fundraising lagged and significant dollars remained to be raised over and above donated architectural fees and in-kind services the City of Gastonia offered. A leadership

gift from the foundation could spur other support and ensure success, Malinda stated.

The request was outside the foundation's next deadline of March 1, 2004, but the trustees entertained discretionary requests from time to time. The board encouraged Malinda to submit an application by December 1, 2003, to accommodate the project's fundraising deadline. At a called meeting on December 9, the board approved a lead gift of \$25,000, contingent on the partner clubs raising the balance of the funds.

As Jack Drum continued to rewrite the bylaws, he retained the provision from the trust indenture stipulating that a minister, member of the session, or chairman of the board of deacons from First Presbyterian Church serve at all times, but he raised an important question. What would happen if the church representative became ineligible after serving one or two years due to a status change? A literal interpretation meant that the church representative could serve only as long as he or she held the required position in the church. If that had been the interpretation when Jim Stuart retired, he would have had to resign from the board. A practical interpretation meant that the church representative at the time of election could serve a full three-year term even if there was a status change during service on the board. That was how the board had handled Jim Stuart's retirement. The board did not formally adopt either option, but entered them into the minutes to guide future boards. Incorporation inched closer.

The good news at the end of 2003 was that the market value of assets had risen to over \$7.6 million.

CHAPTER 10

A New Corporation

2004–2005

The number of nonprofits in Gaston County continued to grow in the early 2000s. Some that would receive foundation funding included Friends of Crowders Mountain, As One Ministries, Bit of Hope Ranch, Christian Women's Job Corps, Dream Center of Gaston County, Interfaith Hospitality Network, Off the Streets, Shining Hope Farms, and Voices for Kids. Another nonprofit corporation would join their ranks within this time frame: the Carrie E. and Lena V. Glenn Foundation Inc.

In January 2004, at the time of the annual meeting, Interfaith Hospitality Network had a successful start-up; With Friends broke ground on a new facility on Keith Drive in Gastonia on land donated by the Pearson family; groundbreaking also occurred for a new building and group home addition at Holy Angels; and the Mount Holly Community Development Foundation was incorporated to fund projects identified in an exciting community-wide visioning process.

Seven Presbyterians

For the first time since 2000, the board elected three new trustees, and it was the first time all seven trustees were Presbyterians. Ernest Sumner succeeded Alex Hall as chairman. Alex became vice chair, Caroline Garrison the secretary, and new trustee Martha Eddins the treasurer. Patrick Perryman, Martha Eddins, Malinda Lowery, and Richard Rankin were seated at the end of the January board meeting.

Now retired, Martha Eddins had moved to Gastonia in 1980 as the first woman city executive of Wachovia and was soon involved in a number of firsts: first woman president of the Gaston County Chamber of Commerce, first woman United Way campaign chair, and first woman president of United Way. She was involved in the Piedmont Council Boy Scouts, Schiele Museum, the Salvation Army, Gaston Dance, and United Arts Council. At First Presbyterian Church, she served as deacon and elder, and chaired numerous committees.

Malinda Lowery was a Gastonia native with a special love for the county. A former teacher, she held a doctorate in education from the University of North Carolina at Greensboro and was co-founder, with Dr. Loretta Dodgen, of Multiple Choice Inc., a well-known organizational development firm, and Human Capital Solutions Group, which provided services to credit unions across the United States. Malinda chaired United Way's community planning division when it produced the most recent community needs assessment. She had also chaired the board of directors of United Way, was a past president of Gastonia East Rotary Club, and served as a deacon and elder at First Presbyterian Church.

Richard Rankin grew up in Mount Holly and was a graduate of Gaston Day School. He received his undergraduate education from the University of Virginia and a PhD in history from the University of North Carolina at Chapel Hill. After a career in academia, he returned to Gastonia as Gaston Day School's head of school in 2001. A visionary with high energy, Richard was an active community volunteer, served on the board of Gaston Literacy Council, and was an elder at First Presbyterian Church, an avid outdoorsman, and the author of books of local and regional interest.

Grant Distributions: 2004

In May 2004, the foundation distributed \$305,300 to thirty-three agencies and organizations. The largest grant, of \$45,000, went to the Gaston County Department of Social Services to build a screened porch and contained courtyard so Gastonia Adult Day Care (The Center) participants, mostly Alzheimer's patients, could safely enjoy being outdoors. Since Gastonia Rotary Clubs were well on their way to raising \$350,000 for their landmark pavilion, the foundation paid its \$25,000 pledge to the Gastonia



The foundation's \$45,000 grant to the Gaston County Department of Social Services in 2004 funded a screened-in porch so that Adult Day Care participants, mostly Alzheimer's patients, could safely enjoy being outdoors. Courtesy of the Glenn Foundation archives.

Downtown Development Corporation (GDDC), a nonprofit corporation formed in 1998. The efforts of GDDC's executive director, Brian Borne, and assistant, Missy Turney, were invaluable to the success of the project.

The board made several \$10,000 grants. One went to Catawba Lands Conservancy for land protection in Gaston County, where half of its conserved lands were located. Another grant funded Reading Soul Mates at the Gaston Literacy Council, a program that had matched middle school tutors with underperforming second-graders in a pilot project in 2003 that now included adult tutors. The Mount Holly Community Development Corporation used its grant to develop a master plan for greenway trails, as Mount Holly was rapidly becoming Gaston County's second largest city. The smallest grant, of \$850, went to Gaston County Amateur Radio Emergency Service (ARES) for a mobile communication unit to help ham radio operators assist the American Red Cross during disasters. Grant funds built a handicapped ramp at Armstrong Presbyterian Church on Union Road.

In August 2004, the finance committee, chaired by Martha Eddins, held its biennial meeting with the fund managers. After their presentations, Martha expressed concern that no manager provided oversight of the fund



After completing a pilot year in 2003, Reading Soul Mates became an ongoing program of the Gaston Literacy Council. The foundation granted funds in 2004 to keep the program going. In cooperation with Gaston County Schools, the council recruits and trains tutors who work one-on-one with at-risk second-graders for thirty minutes weekly to bring their reading skills to grade level and offer them help at a critical point in their education. Courtesy of Gaston Literacy Council.

managers. The current managers had been in place for over fifteen years, and she thought the committee should look at other options. Committee members agreed to ask three outside entities to evaluate the current investment portfolios with the view that one of them would be hired to manage the managers.

Progress at the Garland Center

The Garland Center was scheduled to be completed in November 2004, with a dedication ceremony set for 2005. The Schiele Museum staff had evaluated the space for the display honoring Jick Garland, and tentative plans included two display cases and a kiosk with a television showing a video of his life. In July, Barbara met with the Schiele staff to identify items

that would create visual interest, and worked with the family to develop a timeline of Jick's life to use in the display.

In a downpour on a Tuesday in September, Barbara traveled to Charlotte to pick up two bags of memorabilia for the Garland display from Jick's daughter, Woods Potts. The two raced to Barbara's car and put the bags on the front passenger seat. Back at the office, Barbara inventoried the contents. Among the family's donation were Jick's senior class yearbooks from Gastonia High School and the University of North Carolina at Chapel Hill; a gun Jick may have had from World War II; photographs of his football team at Gastonia High School; letters he had sent to his parents from northern Ireland during World War II (mostly relating to a lack of Southern cooking); his Bronze Star campaign service medal from 1944; his Distinguished Service Award from the University of North Carolina at Charlotte; his Rotary Paul Harris medallion (he had thirty-five years of perfect attendance); and the Order of the Long Leaf Pine certificate, issued by Governor Terry Sanford in 1964.

After conducting the inventory, she turned the materials over to Dave Shurbutt at the Schiele. The next day, Dave called. "Barbara," he asked, "did you know that gun was loaded?" She did not, and was relieved that the gun did not go off in the office during her inventory . . . or his.

Changes on the Board

David Stoker could have returned to the board after a one-year absence, but he encouraged Patrick to continue, and the board elected Patrick to a full three-year term. Alex rotated off after six years, and Timothy T. Paschall succeeded him. Ernest continued as chairman for a second year, with Malinda serving as vice chairman, Caroline as secretary, and Martha as treasurer.

Tim Paschall graduated from North Carolina State University with a degree in chemistry and worked in textiles before he founded the financial firm of Paschall & Associates in 1997. He served his clients as a certified financial planner, licensed investment advisor, and charter life underwriter. Tim was a past president of Gastonia East Rotary Club and the Western Piedmont Estate Planning Council and had served on the boards of the

Schiele Museum and the Gaston Regional Chamber. He had been a deacon and elder at First Presbyterian Church. Tim's office was located in the Union Commons office complex two doors from the foundation's office.

2005–2008 Strategic Plan

In the fall of 2004, at its planning retreat, the trustees modified the mission statement and set new goals for the next three years. The mission statement now read: "The mission of the Carrie E. and Lena V. Glenn Foundation is to *promote and* support the charitable spirit of the Glenn sisters by helping people in our community through grants for religious, health, educational, cultural, and *other needs*." (Changes in italics.) Among the goals the board adopted for 2005–2007 were to investigate a professionally managed portfolio; become a 501(c)(3) corporation; develop a marketing plan to include a website and annual report; review guidelines for bricks-and-mortar projects; and engage in dialogue with other foundations to address major needs in the community. Armed with the new plan, the board embarked on its busiest year since 1986.

New Bylaws

Over three years had passed since the issue of the bank representative first presented itself. The transition from indentured trust to incorporation still had not occurred, owing in part to Jack Drum's health issues. The finance committee had met with Jim Ratchford and Jack and agreed that a June 30 fiscal-year close was more compatible with the foundation's working calendar. The finance committee and board approved the change. In October, Jack filed for a federal identification number, which the IRS assigned two weeks later.

The new bylaws kept the number of directors at seven, with the option to increase to nine; changed the title of the board chairman to chairperson to distinguish the position from the trust; eliminated the bank representative; and continued the requirement that a representative from First Presbyterian Church serve at all times. Because of the change in the fiscal year, the fall meeting became the annual meeting, when officers and directors

were elected and the board reviewed the financial report. Directors were now seated at the end of the meeting that the bylaws called the first meeting of the calendar year. Jack addressed by resolution the duties of officers and standing committees and the right of the executive director to co-sign checks, since resolutions were easier to amend than bylaws.

Incorporation

Once again, the board in place in December 2003 when the foundation received the articles of incorporation needed to be the same board to adopt the bylaws for the corporation. By resolution, Caroline Garrison, Alex Hall, George Hodges, David Stoker, Jennie Stultz, and Ernest Sumner approved the corporate bylaws. Jack prepared organizational minutes for the corporation to accompany the IRS application.

On March 3, 2005, two days after the deadline for 2005 grant applications and with all paperwork in order, Barbara mailed the IRS a letter explaining the transition from trust to corporation. Included with the mailing were the application for tax exemption, copies of the articles of incorporation and bylaws, and the resolution for written consent of the initial board of directors of the Carrie E. and Lena V. Glenn Foundation Inc. to action without an organizational meeting, along with the \$500 application fee. Fewer than three weeks later, on March 23, 2005, the foundation received notification of tax exemption from the IRS. Such a rapid turnaround time is almost unheard of, but was likely due to Jack Drum's attention to detail and the foundation's track record as an indentured trust for over thirty years. Trustees would soon develop a transition plan.

Two Dedications

On March 10, 2005, the dedication of the James B. Garland Municipal Business Center took place. Debby Key and Barbara had worked closely to plan the event. Attending were members of the Garland family, the mayor and city council, the foundation's board of trustees, invited guests, and interested citizens. Mayor Jennie Stultz extended the welcome, and former trustee David Stoker delivered the invocation. The honor guard from the Gastonia Police Department presented the colors, Gaston County's World



The 1911 Gaston County Courthouse became the James B. Garland Municipal Business Center to honor long time Gastonia Mayor Jick Garland, the Glenn sisters' attorney. Jick learned of the honor before his death in 2002. The Garland Center was dedicated in March 2005. Courtesy of the Glenn Foundation archives.

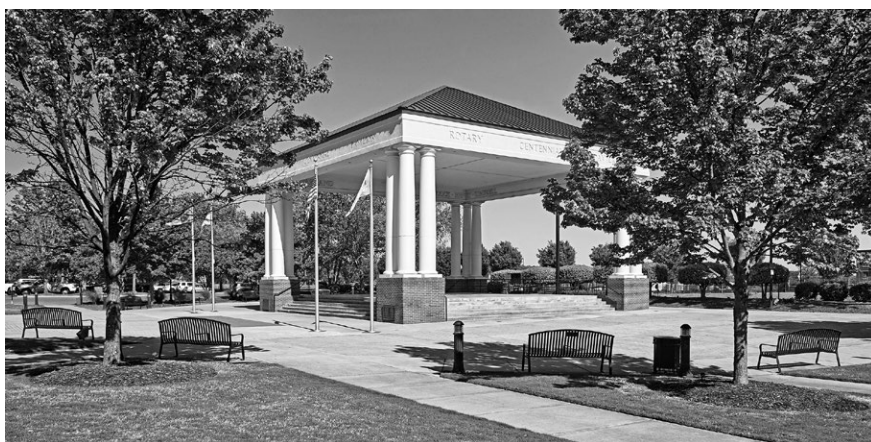
War II Last Man Club raised the American flag, Leigh Painter sang the national anthem, and Jick's young grandson, James Boyce Garland III, led the Pledge of Allegiance. Chairman Ernest Sumner brought greetings from the Glenn Foundation. Other speakers included members of the Garland family, the Gastonia City Council, and Shelby Mayor Ted Alexander, who was also director of the southwest regional office for Preservation NC. In that capacity, and as a part of the dedication ceremony, Alexander presented the City of Gastonia an award for the restoration of the historic 1911 courthouse.

Following the ceremony, the public toured the center and enjoyed refreshments. The first stop was the Garland display in the lobby that featured two cases filled with interesting memorabilia. A video of Jick's life, which had been prepared by Tony Hoppa of the University of North Carolina at Charlotte when Jick received the Distinguished Service Award, ran in a continuous loop on a wall-mounted television. The display included a bench, an oversized poster picturing Jick with a timeline of his life, and the plaque honoring the Glenn sisters. It read:

The Carrie E. & Lena V. Glenn Foundation funded this display in gratitude for the longstanding contributions of James B. Garland to Carrie and Lena Glenn and to the Foundation. Mayor Garland served as the sisters' attorney, drew up the Trust Indenture that governed the Foundation, and advised the Board of Trustees from 1971 until his death in 2002.

The day was perfect in every way, and the Garland family was humbled and grateful for the remembrance.

On April 16, the new Rotary Centennial Pavilion was dedicated to the City of Gastonia and its citizens. The impressive open-air structure with its twelve columns, four flagpoles, benches, and distinctive blue roof was an instant landmark at the north end of South Street, and visible from both Franklin Boulevard and Long Avenue. It became a venue for special events and a catalyst for downtown revitalization within a few years of completion, as the city made improvements in the immediate vicinity, including a new pedestrian plaza with additional benches and landscaping, a fountain, and a brick sculpture depicting historical symbols of the city. On the side of the building originally owned by Frost Torrence and located on the southwest corner of South and Main, Ty Hobson painted a mural of interesting



The Glenn Foundation was the largest contributor to the Rotary Centennial Pavilion in downtown Gastonia. A project of three Gastonia Rotary Clubs, it was built to celebrate the centennial of Rotary International in 2005. The pavilion became a catalyst for downtown development. Courtesy of the Glenn Foundation archives.

historical symbols and landmarks in the city and county. A nearby downtown infill park, future home of Center City Crossing apartments, featured a kinetic sculpture and five huge panels for interchangeable artwork hung prominently on an adjacent building's old brick exterior wall.

Fund Manager Selection Completed

In early 2005, the finance committee interviewed three fund-manager candidates. On its recommendation, the board approved John Granzow, of the Granzow Consulting Group of Wachovia Securities in Charlotte. The committee believed he would provide an analytical approach to investments along with personal attention. He came with excellent references. One of John's first tasks was to assist the finance committee, which doubled as the investment committee, to establish an investment policy statement.

US National Whitewater Center Proposal

Before reviewing 2005 applications, the board turned its focus to the unique proposal it received from a new nonprofit organization in northwest Mecklenburg County, the US National Whitewater Center. The center requested a ten-year, \$250,000 loan, not a grant, and that called for special attention. The foundation was among the final organizations the center approached. A man-made whitewater center was the vision of an attorney and lover of the outdoors named Jeff Wise, whose idea caught the imagination of Alan Dickson, retired president and CEO of Ruddick Corporation. Dickson championed the project and chaired the center's board of directors.

The Whitewater Center had secured a forty-year lease on 1,200 acres of a Mecklenburg County park across the Catawba River from Mount Holly, and had begun building the best and largest recirculating artificial white-water river in the world. Its founders did not envision an entertainment complex but rather a sports-based venue to get people outside to enjoy a healthy, active lifestyle without having to travel to the North Carolina or Georgia mountains.

On May 11, 2005, Jeff Wise met with the board. Accompanying him was Gastonia businessman and community leader Ben Rudisill, a member of the center's board of directors. The Whitewater Center was seeking funds from

four primary sources: senior loans from banking institutions; community development loans from private and public foundations and individuals whose loans were subordinate to the senior loans; public fundraising; and governmental entities. Seven local governments, the majority in Gaston County, had signed local service agreements to underwrite operating costs if the Whitewater Center did not make a profit after seven years.

The idea of obtaining loans rather than grants came as a result of a pro forma showing the Whitewater Center making money once it was fully operational. Wise asked the foundation to become a partner in the venture by participating in the community development loan program for the minimum investment of \$250,000. One selling point was the possibility that the center might become the national kayak training facility for the 2008 Summer Olympics, in Beijing, China. The maximum term of the loan was ten years, with quarterly interest of 5 percent for the first three years and 7 percent for the balance of the term. Excess cash flow would be used to repay the loans, and Wise expected loan repayments to terminate early.

Grant Deliberations: 2005

After the guests left, the trustees began deliberations on the record eighty-eight applications submitted. Requests totaled \$1,392,832 against \$283,405 available to distribute, and the board approved thirty-eight applications. One grant went to As One Ministries for operating costs for a day shelter and resource center for homeless individuals; to Belmont Community Organization for prescription assistance for low-income clients who were uninsured or underinsured; to Cherryville Area Ministries to transport elderly, indigent clients to doctors' offices and pharmacies; and to the Christian Women's Job Corps, an outreach ministry of Gaston Baptist Association, to prepare for self-sufficiency women who were enrolled in the Work First Program of the Department of Social Services or who lived at Catherine's House or the Shelter of Gaston County. American Legion Post 23 received a grant to help organize artifacts at its military museum on Second Avenue.

A grant helped bring the Big Bugs education program to Daniel Stowe Botanical Garden. The garden had started in 1989 when Belmont textile executive Daniel Stowe donated 380 acres of his land along lower New Hope Road to build a world-class botanical garden. Another grant provided

operating support for Gaston Community Concert Band, and yet another provided matching funds for KaBOOM! Inc., a project of Home Depot to build a playground in one day at the Gaston County Family YMCA's Outdoor Family Center at Karyae Park near Crowders Mountain. Two years later, the foundation helped fund an Alpine Teambuilding Tower there.

US National Whitewater Center Decision

With 2005 grants finalized, trustees returned to a discussion of the pros and cons of the US Whitewater Center's proposal. Despite the risks, the idea appealed to the majority of trustees. A number of textile mills sat vacant. High unemployment continued. Many in the county's workforce were untrained for modern manufacturing operations, making new businesses hesitant to invest in Gaston County. Key industrial sites had no water or sewer connections, and a referendum on a one-half-cent sales tax to fund water and sewer lines had recently been defeated at the polls.

Trustees who were drawn to the Whitewater Center's potential viewed it as a transforming investment that would create jobs and bring outside dollars into the county. The center would support healthy lifestyles, provide recreation, and give people the opportunity to enjoy nature close to home. The trustees believed the projected income stream would meet loan obligations, and they saw the investment as an opportunity for the foundation to support something exceptional for the region.

Fund manager John Granzow and attorney Jack Drum strongly advised against the loan, as did Martha Eddins, treasurer. The three knew that no enterprise could be successful when funded entirely by debt. Of greatest concern was that a loan from the foundation would be subordinated to loans made by the senior lenders. In addition, there was no collateral in case of default because the land was leased. While the loan could be considered part of the foundation's fixed-assets portion of the portfolio, John Granzow noted, it could hardly be called an investment, since the rate of return was inadequate for the risk presented. He graded the investment below a B-rated bond, and Jack called the investment "very, very risky."

The trustees discussed the prospect of losing money if interest rates rose above 5 percent. They were likewise concerned about the potential loss of assets if the project failed completely. Losing a quarter of a million dollars,

3.5 percent of the foundation's assets at the time, would be a larger blow to the smaller Glenn Foundation than to many other community development loan participants. And while the trust indenture permitted loans, the foundation had never loaned money, and so this would set a precedent. The board deferred the vote for one week.

On May 17, 2005, the board met to vote on the proposal. Patrick Perryman, on vacation, joined via conference call. The majority concluded that the worst possible outcome would be the loss of \$250,000 in assets and a year off from grantmaking. In a six-to-one vote, the board approved the \$250,000 community development loan to the US National Whitewater Center and authorized Ernest Sumner to sign the appropriate documents. There were no hard feelings following the vote, and in the end, both views were correct.

Finalizing Nonprofit Status

The foundation's advisors—attorney Jack Drum, Jim Ratchford, CPA, and financial manager John Granzow—had met with the finance committee to discuss the transition from trust to corporation and brought a plan of action for the board's consideration. All activity for the trust indenture would cease on June 30, 2005; the corporation would begin operations at 12:01 a.m. on July 1, 2005; BB&T would complete the 990PF for the final year of the trust ending September 30, 2005; Cherry Bekaert & Holland would complete the 990PF tax return and the financial review for the corporation's first fiscal year, July 1, 2005–June 30, 2006, and continue preparing both going forward. The board approved a nine-month financial review, October 1, 2004–June 30, 2005, since the trust would have no assets on September 30, 2005. The limited activity anticipated to take place in the trust after June 30, 2005, could be summarized and inserted at the back of the review or in a separate document. The board approved, and Jack drew up resolutions necessary to execute the plan.

Barbara paid out all 2005 grants before June 30, the date when all activity in the trust's checking account ceased. Between June 30 and September 30, 2005, in a two-step process, John Granzow transferred the foundation's trust assets with existing fund managers (except for a Caldwell & Orkin

fund that was subject to administrative delays at BB&T) to a new corporate account, sold those funds, and purchased investments of his choosing.

Although the board had set \$250,000 aside for the loan to the White-water Center, the center had not requested the funds on the advice of its attorneys. It was working with senior lenders to raise the loan ceiling from \$25 million to \$32 million. China's purchases of steel and concrete were driving up costs. After senior lenders agreed to raise the loan ceiling, John transferred funds to the center from the corporate account.

Last Meeting/First Meeting

On July 19, 2005, the last meeting of the trust took place in the session room of First Presbyterian Church. Jack Drum, now a partner in the firm of Stott Hollowell Palmer & Windham, attended the meeting with John Granzow. No business of note was transacted except approval of the May 17, 2005, minutes.

Immediately afterward, the first meeting of the corporation took place, and Caroline Garrison, Ernest Sumner, Martha Eddins, Malinda Lowery, Patrick Perryman, Richard Rankin, and Tim Paschall became the only individuals to serve the foundation both as trustees and directors. John Granzow presented the statement of objectives, policies, and guidelines, including the proposed asset allocation, and the board approved the statement and proposed fund managers. John's long-term goal was to exceed the rate of inflation plus 4 percent. The finance committee began meeting with John quarterly to review and rebalance the accounts.

For the ease of winding up the affairs of the trust and to avoid convening additional meetings of the board, Jack drafted a resolution for written consent to action without meeting. After almost four years of transition, the business of the trust officially ended on September 30, 2005, after thirty-four years.

The foundation found a new rhythm to its work. Annual meetings now occurred in the fall. The board of the new corporation held the first annual meeting on October 25, 2005. The first meeting of each year would be called the first meeting of the calendar year, held in January or February. Grant deliberations still occurred in May, with grant checks written after July 1.

Moving Forward

In addition to the heavy agenda throughout 2005, the board reaffirmed its long-standing position on autonomy after the Community Foundation seemed to be making contact with the staff and board more frequently. By August, the board implemented a marketing plan, including an annual report. Barbara provided copy and Richard Rankin's wife, Sarah Park Rankin, designed and produced the report. The foundation's first annual report went to over 200 foundations, individuals, community leaders, and grant recipients, and the board was pleased with the feedback. In another marketing initiative, the board approved the content and launched the foundation's new independent website, selecting as the domain name www.theglennfoundation.org.

New and Reaffirmed Policies

When the board received a small donation from an unrecognized source, it adopted a policy to accept gifts. It stated that the foundation would accept unrestricted gifts of cash or cash equivalents, but that each opportunity would be individually assessed. It also adopted a policy on recipient accountability, formally barring grantees from applying to the foundation for three years if they failed to comply with reporting requirements. In addition, the rules and procedures committee revised existing policies either to reflect the change from the trust to corporation or to streamline wording, and the board approved.

The committee reaffirmed directors' compensation, established a schedule for an annual staff review, and reaffirmed seven grantmaking policies on agency line items, agency staffing, multiyear grants, geographic location, planning grants, Presbyterian causes, and umbrella agencies. The board approved an operating budget for the new fiscal year. Jack Drum modified the office lease to transfer it from trust to corporation and adapted the conflict-of-interest policy to the corporation. Barbara notified the foundation's business partners of the change in legal status.

Looking back, the board addressed five of the eight goals of the three-year strategic plan in one year. Goals remaining to be addressed were

encouraging project grantmaking, dialoguing with other foundations to address major needs, and developing internal guidelines for grants for bricks-and-mortar grant requests. Notwithstanding all that had been accomplished, more changes and challenges lay ahead.

Staff Responsibilities

During her six-year tenure, Barbara learned that the executive director of a foundation wears many hats. In addition to staffing board and committee meetings, recording minutes, managing office finances, and following up on assignments, she managed the grant process, followed up on board initiatives, visited agencies, stayed on top of tax deadlines, prepared information for the financial review, served on community boards, and participated on community task forces and strategic planning processes. When possible, she attended ribbon cuttings, open houses, building dedications, and annual meetings of funded agencies. Occasionally, she met with agency fundraising consultants who were gauging foundation support for a special project or capital campaign. While hers was a part-time position and the foundation was small, the experiences were instructive. Her community participation brought visibility to the foundation. In return, she learned about agencies and their personnel in more depth, and it helped her stay updated on community needs so she could assist directors in their decision-making.

CHAPTER 11

Changes and Challenges

2006–2007

After such a busy year in 2005, the board thought it would be good to host a luncheon for former trustees, in order to bring them up to date with the recent changes, now thirty-five years after the Glenn sisters signed the trust indenture. Such an event would also provide an exclusive orientation for Jane T. Sumner and Richard K. Craig, who were elected to succeed Caroline Garrison and Ernest Sumner. The meeting took place on January 25, 2006, at the Gaston Country Club. As the outgoing chairperson, Ernest presented Caroline with a resolution signed by the directors, praising her lengthy service and devotion to the foundation. Directors joined foundation alumni to pose for a historic group photograph that included founding trustees Hugh Bryant and Judy Miller.

Over lunch, guests viewed photographs of past grant-funded projects. Directors took turns giving updates on the transition from trust to corporation, the new fund manager, new policies, new marketing plans, and the foundation's investment in the US National Whitewater Center. The alumni enjoyed their time together.

Malinda Lowery became chairman at the end of the meeting. Fellow officers included Patrick Perryman, vice chairman; Tim Paschall, secretary; and Martha Eddins, treasurer, with Richard Rankin, Rick Craig, and Jane Sumner rounding out the board. With Jane and Rick's arrival, board composition remained unchanged for three years. The two new directors brought their perspectives and experience to the board.

Rick Craig was president and chief operating officer of A. B. Carter Inc.,



This historic picture of trustees and directors was taken in 2006. Seated, l. to r.: J. David Wright, Elizabeth Triplett “Trip” Stewart, W. Alex Hall, Judy M. Miller, Hugh F. Bryant, Sarah A. Abernethy, Craig Fielding, and Caroline H. Garrison. Standing, l. to r.: Patrick Perryman, Jane T. Sumner, George “Lud” Hodges, Ernest W. Sumner, Martha D. Eddins, Malinda B. Lowery, Timothy T. Paschall, and Richard K. Craig. Courtesy of the Glenn Foundation archives.

a supplier of machines, products, parts, and accessories for the textile industry. A graduate of Erskine College, he held an MBA from the University of Georgia and was also a graduate of the executive management program at the University of North Carolina at Chapel Hill. Rick had broad experience as a community volunteer, serving on the boards of American Red Cross, the Salvation Army, and United Way of Gaston County. He was a deacon and elder at First ARP Church in Gastonia and a member of the Rotary Club of Gastonia, and served on the boards of Gaston Memorial Hospital (CaroMont Health) and Citizens South Bank.

Jane Sumner began her career as a teacher before becoming an assistant principal and then principal in Gaston County schools. In her last four years before retirement, she was director of elementary education and director of compensatory education. Jane was an active member of First

United Methodist Church and served on the boards of Family Service Inc. and the Gaston County Family YMCA Metro branch. She was married to Robert Sumner, another of Harold Sumner's sons, and was a sister-in-law of both Ernest and Liz.

Grant Distributions: 2006

The March 1 grant application deadline brought seventy-six applications, and the board funded thirty-nine for \$298,723. One grant went to the new Lonnie and Rachel Waggoner Nursing Education Endowment Fund of the Community Foundation to benefit a Gaston College nursing student. Lonnie had cancer, and his friends established the fund to honor him and his wife, a nurse by profession.

The board used the Golden Rule to award a \$30,000 multiyear grant to the Legacy of Love renovation campaign at First Presbyterian Church, payable in three installments in 2006, 2007, and 2008, honoring the foundation's long association with the church. A grant to the Gaston County Museum of Art & History assisted with renovations of the former Carolina & North-Western train depot in Dallas, the rail line that ran past the old Glenn homestead, for programs, art shows, and history exhibits.

A grant to the Gaston County Sheriff's Office funded books and educational materials for GED classes taught to jailed youthful offenders. Gaston Family Health Services purchased two power exam tables for its new SeniorCare facility on Third Avenue. Gaston Hospice purchased specialized equipment and furnishings for its new twelve-bed inpatient hospice facility, soon named the Robin Johnson House for its founder. Hospice honored the foundation on a donor plaque posted near the entrance. The directors appreciated the recognition, since it built community awareness of the Glenn Foundation, although they agreed that a worthwhile grant was never contingent on a naming opportunity.

A grant to Gastonia Downtown Development Corporation funded Arts at the Pavilion, a day-long visual and performing arts celebration to showcase the Rotary Centennial Pavilion; to Highland Family Resource Center for an after-school homework assistance/summer program for the Weldon Heights neighborhood; to the Salvation Army's Center of Hope homeless



The Gaston County Museum of Art & History saved the Carolina & North-Western depot in Dallas, and with the help of a foundation grant in 2006 it became a venue for art classes, programs, and exhibits. Courtesy of the Gaston County Museum of Art & History.

shelter to furnish five family rooms with bedroom sets and a monitoring system to assure the safety and security of residents; and to Off the Streets Program, a residential facility established in 2004, which provided tough love and a fresh start for women with substance addictions or who had been incarcerated or had engaged in prostitution.

A Fresh New Look

On October 20, 2006, when the board met for the annual meeting, John Granzow had managed the portfolio for one year. Despite transferring \$250,000 to the US National Whitewater Center the previous December, assets had grown to \$7,220,396.

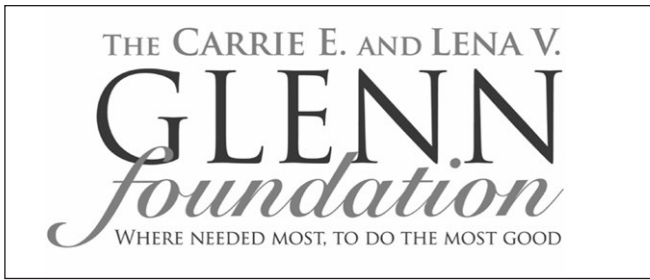
The Glenn Foundation's logo had not been updated since 1986, so as a part of the marketing goal, the board agreed to seek a new logo design.



The foundation funded twelve patient beds at the new Robin Johnson House, named for the founder of Gaston Hospice, which opened in Dallas, North Carolina, in 2006. Courtesy of the Glenn Foundation archives.

Tim Paschall took on this responsibility and received bids from four public relations groups. The Moonlight Creative Group, from Charlotte, produced a logo with a fresh new look and new colors. The tagline, created by Chris Jensen, read: “Where needed the most. To do the most good.” Letterhead, envelopes, the website, and annual report soon reflected the new look.

In 1987, applicants had mailed written requests for the application form and received it in the mail. This evolved to written requests and the application sent on a floppy disk. Now, requests came by email, and Barbara emailed the application, saving time and postage and making applicants happy with the short turnaround. The application has never been accessible from the website because of the board’s desire to screen applicants for tax-exempt status and appropriateness of the proposed program to the foundation’s priorities.



In 2006, with the change from an indentured trust to a corporation, the directors approved a new logo with the tag line: “Where needed most. To do the most good.” It was the only advice the Glenn sisters gave outside of the founding document. Courtesy of the Glenn Foundation.

Records Retention Policy

After seven years, Barbara had processed 587 applications and stored the master copies in file cabinets. The old applications, financial information, insurance policies, legal documents, and correspondence saved since 1971 were outgrowing the storage capacity. The board needed to decide whether to keep every document or come up with a systematic plan to purge outdated material. After considerable research, Barbara drafted a records retention and disposal policy and a records retention schedule, documents that Jim Ratchford and Jack Drum reviewed and approved. The policy and the schedule detailed which documents should be kept permanently, which should be kept only for a specific length of time, and which could be discarded. It also spelled out what documents should be filed with funded proposals so that grant files were always in order, in the improbable event of an IRS audit. Filed with funded applications were the letter of notification, the application, the signed agency agreement, the notification letter with a copy of the check, the agency’s letter of tax exemption, and its tax return information, whether a compilation, financial review, audit, Form 990, 990-EZ, or 990-N. Any related correspondence or publicity was also added. The board annually approves a records disposal form listing files to be discarded that year.

Autonomy Redux

John Edgerton, who had done an exemplary job as executive director of the Community Foundation since 1994, announced his retirement, and Wachovia banking executive Spurgeon Mackie, a member of First Presbyterian Church, was named to succeed him. With the transition of leadership and with approaches from the Community Foundation coming more frequently, the board asked chairman Malinda Lowery to write the Community Foundation stating the foundation's firm desire to remain autonomous. Malinda's letter of October 30, 2006, to Henry Massey, the Community Foundation's board chair, read:

Over the past several years as well as recently, members of the Community Foundation board and staff have made informal overtures to certain board members and to the staff of The Carrie E. and Lena V. Glenn, Foundation Inc. inviting the Glenn Foundation to consider becoming a donor advised fund of the Community Foundation.

Our recent transition from an indentured trust to a nonprofit corporation speaks to our desire for autonomy and an independent future for our foundation. Our board met last week and affirmed once again its desire to remain a private, independent foundation. This decision honors the memory of our founders. Moreover, we believe that the Gaston County community benefits from the presence of both our organizations.

Our board felt it to be an appropriate time to convey this affirmation to you as the Community Foundation experiences a transition in leadership. We continue to value a cordial and cooperative relationship with your board and staff.

Birth of a Philanthropy Initiative

The most ambitious goal of the foundation's strategic plan was the one that called for a dialogue with other foundations to address major needs. To fulfill the goal, Richard Rankin, chairman of the long-range planning committee, suggested that the Glenn Foundation host a luncheon for

representatives of local foundations and philanthropists to identify a project all would want to support that addressed a critical need facing the Gaston community.

Given the board's go-ahead, the committee met in March to plan the logistics for an April luncheon and to identify the list of invitees. They included representatives of the Community Foundation, First Gaston Foundation, Gaston Memorial Hospital Foundation, and the David Belk Cannon Foundation. The hospital foundation was established from hospital profits, and directed grants to health-related projects. The David Belk Cannon Foundation was established after the death of the adopted heir to Belk and Cannon fortunes, who spent his career in the Belk department store chain. Cannon had received his early retail training at the Matthews-Belk department store in Gastonia, learning from Carrie and Lena's neighbor, Frank Matthews. Having no direct heirs, Cannon left his estate to the Community Foundation, where it was classified a Type III supporting organization.

At the April 18, 2007, luncheon, Malinda and Richard explained the Glenn Foundation board's interest in discussions regarding ways the group could promote the prosperity of Gaston County, whether through health, education, workforce development, or other areas it might identify. They expressed the foundation's excitement about the possibility of collaborating so that funding could go where it was needed most, to do the most good. The concept of a philanthropic partnership was well-received, and a subcommittee of representatives of the three main partners, Glenn, Community, and First Gaston foundations, was assigned to identify and research a project to recommend to the larger group.

With the philanthropic small group identified and that process underway, the directors turned their attention once again to address the issue of grants for bricks-and-mortar projects. Since the term "capital campaign" encompassed the term "bricks and mortar," the board adopted a new policy that stated that the foundation did not ordinarily consider capital campaigns, but would consider requests on a case-by-case basis. If such requests were funded, the board would look favorably on naming opportunities when appropriate.

More Whitewater Problems

The US National Whitewater Center was completed in mid-2006 but did not hold the grand opening until November 4, 2006. Due to delays in completing Whitewater Parkway, the major access road to the facility, the center lost revenue in its first summer, but the foundation was pleased to receive quarterly interest payments as agreed. In early 2007, the center needed \$6 million in additional capital to offset the loss of operating revenue over the summer. Senior lenders agreed to increase their investments from \$16 million to \$22 million if community development lenders would forego interest until the senior lenders were repaid in full. In exchange for the loss of interest income, the interest rate would increase from 5 percent to 7 percent, with the earliest payment of principal and interest projected to be October 2014. This proposal did not rest well with Martha Eddins.

A group of Gaston County community development loan participants met via conference call with attorneys for the senior lenders, where Martha's experience in banking and finance put her in a leadership role in the discussion. She saw no reason why community development loan participants should forego interest payments, based on projected revenues, and as a result of her advocacy, participants continued to receive interest payments as originally agreed. Martha also questioned why participants should be linked to payments for legal costs associated with litigation and foreclosure, and those were removed as well. Malinda signed the amendment to the Whitewater agreement.

Grant Distributions: 2007

On May 17, the board finalized grant decisions and allocated \$331,800 for forty-three projects. The largest grant, \$25,000, went to the Biggers Commemorative Mural Fund at the Community Foundation, completing the Glenn Foundation's bookend grants to the project that had begun in 2000. Supporters had established the fund, where charitable contributions could be earning interest until the project was completed. In the intervening time, others in the arts community joined the effort to make the mural a reality.

After John Biggers's death, the mural committee chose to reproduce one of his original paintings, "This Little Light of Mine," in glass mosaic

tile, with dimensions sixteen feet wide by eleven feet tall. The painting featured shotgun houses and railroad tracks, images that seemed to fit Gastonia's history. The committee planned to install the mural on the front façade of the Schiele Museum because of its prominent location on Garrison Boulevard, its large numbers of visitors, and the museum's sterling reputation. By 2004, Miotto Mosaic Art Studio, in New York City, owned by Stephen Miotto, had completed the mural in Sperlongo, Italy, and shipped it to the New York studio, where Miotto generously allowed it to remain while the committee struggled to raise funds for shipping to Gastonia and installation. It was now 2007, and Miotto needed to reclaim his space. The foundation's grant covered the balance due plus the cost of installation, setting in motion a dedication ceremony in 2008.

A grant to the Daniel Stowe Botanical Garden funded the Children's Willow Maze and resulted in a naming gift. A grant to the Lucia Riverbend Volunteer Fire Department purchased defibrillators and wet suits for Gaston County's only rescue squad trained for water rescue. The Cherryville Historical Association bought a new heating and air conditioning system with its grant. The Salvation Army Boys and Girls Clubs used its grant for staff training. Webb Street School purchased a greenhouse and shop equipment.

In a similar vein, the board granted funds for tools, supplies, plants, and other materials for the Warlick Alternate School (Warlick Academy) horticulture program, an elective course that benefited participating students who were unsuccessful in the regular classroom setting. A grant to United Way funded Dolly Parton's Imagination Library for the Success By 6 program, delivering a free book monthly by mail to the homes of registered children between birth and six years old. A grant to the Gaston County Parks & Recreation Department Park Partners Fund at the Community Foundation contributed to the cost of building Gaston's first dog park at the new George Poston Park in Lowell.

Philanthropy Initiative Identified

When grant deliberations ended, Richard Rankin asked the board to consider multiyear funding. With the prospect of a community initiative, Richard reasoned, the foundation could contribute larger sums to more

substantial projects, receive more naming opportunities, and bring greater recognition to its work. If a project emerged from discussions with the philanthropy group, a larger multiyear contribution might be needed to assure a project's success.

The philanthropy subcommittee met three times in late 2007 as its members worked to identify a big-impact project important enough to capture the enthusiasm of the philanthropy group. The meetings took place at the Community Foundation's conference room in September, November, and December, attended by representatives of the lead foundations. In September, under Spurgeon Mackie's leadership, the subcommittee examined the financial impact if each foundation committed 20 percent of annual grant funding for three years toward ongoing projects. The projected amount was \$630,000. Foundation representatives who attended the meeting suggested the following amounts: the Community Foundation's share at \$100,000 per year after a set-aside for Run for the Money, or \$300,000 over three years; the Glenn Foundation's share at \$60,000 per year, or \$180,000 over three years; and First Gaston Foundation's share at \$50,000 per year after scholarship obligations, or \$150,000 over three years. Allocating funds for joint community projects would be built into each foundation's budgets on an ongoing basis to cover the first and subsequent projects. The thought was that these funds could be considered lead gifts, and with the right project attracting a broad base of support from philanthropists, businesses, industries, and public sources, the potential was there to raise over \$1 million.

The three sponsoring foundations historically shied away from multiyear grants, but subcommittee members agreed that their boards would probably consider an exception in support of the right joint venture. They also agreed that any project they selected needed an administrative structure in place upon which future boards might rely, that included accountability of funds and monitoring and evaluating accomplishments. The members agreed to keep their respective boards informed and to solicit feedback about who should be invited to present ideas at the meetings. After hearing all presentations, the subcommittee would recommend one project to the philanthropy group. Finally, members agreed that doing something, even if the project selected was not perfect, was preferable to doing nothing because of the county's many needs. They envisioned that the first three-year

project could be identified in 2008 for funding in 2009–2011, the second identified in 2010 or 2011 for funding in 2012–2014, and so on.

When the foundation directors met for the annual meeting on October 16, 2007, Richard Rankin reported on the philanthropy subcommittee's two major recommendations: that the three foundation boards each commit 20 percent of annual grant funding to selected community project(s) on an ongoing basis; and that there be accountability of funds, monitoring, and evaluation. Directors expressed concern about the loss of control with a joint project and of having only 80 percent of funds available for the traditional grant programs, but after discussion, they approved the concept of committing 20 percent of annual grant funding for a project. More new businesses might choose Gaston County if an initiative resulted in significant community improvement, they reasoned.

In November 2007, when the subcommittee met a second time, the group listened to presentations from Elyse Hillegas, president and CEO of the Gaston Regional Chamber; Jim Palenick, Gastonia city manager; Jan Winters, Gaston County manager; Donnie Hicks, executive director of the Gaston Economic Development Commission; and Colleen Bridger, public health director, and her colleague Bill Gross, of the Gaston County Health Department. These leaders presented a substantial list of concerns: the high school dropout rate; education of young people, especially options for those not college bound; skills training; a perceived disconnect between the secondary schools and access to Gaston College; downtown redevelopment to change negative perceptions of Gastonia; lack of a skilled workforce; the county's questionable image; an aquatics center to attract visitors and address obesity, Gaston's primary health issue; and the formation of a recreation league to meet the socialization and health needs of older adults. After discussion, representatives agreed to meet next with leaders in education and business.

The final meeting of the philanthropy subcommittee took place in December 2007, with the topic workforce development. Chamber CEO Elyse Hillegas returned, joined by Reeves McGlohon, superintendent of Gaston County Schools, and Pat Skinner, president of Gaston College, who came with Sylvia Bajorek, director of the Gaston College Foundation, Linda Greer, vice president for education and workforce development, and Joy Morrow, job developer/coordinator of work-based learning and placement.

The presenters identified pressing issues within workforce development: keeping students in high school through graduation; introducing them to job training opportunities available after graduation; and retraining adults without a high school education who were displaced from traditional textile mill jobs. Addressing these issues effectively would have a ripple effect over time that would address other needs in the county.

The presenters stated that between 30 percent and 40 percent of Gaston County ninth-graders were dropping out of school before their senior years. Mills that used to hire dropouts were gone, and new businesses did not want to employ them. The result was that many high school dropouts were either unemployed or held low-skill jobs. The academic skills of newer dropouts and older workers were so deficient that many of them had to enroll in adult basic education classes at Gaston College in order to prepare for GED classes. Community college policy made high school dropouts wait six months before they were eligible to enroll unless they completed a notarized form with their principal's signature. The college planned to start an early-college high school program targeting first-generation college students, where they would receive a high school diploma and an associate's or technical degree at the end of five years, but it was not scheduled to begin until fall 2008.

To encourage recent graduates to consider manufacturing jobs, the Gaston Regional Chamber had produced a video for non-college-bound students and their parents describing manufacturing jobs available in the county. Job fairs gave high school students opportunities to learn what was available at the workplace, although most jobs required some post-high school education and skills training. The college offered numerous training programs and certifications to prepare people for good-paying jobs, in welding and machinery for example, but these classes had few students. There needed to be more connection with available resources.

Discussion turned to a job skills assessment system called ACT WorkKeys, a computer program that measured a future employee's real-world skills critical to job success, including applied mathematics, reading for information, and locating information. The WorkKeys assessment delivered a career readiness certificate, which was a predictor of employment success in four levels of certification: bronze, silver, gold, and platinum. Having this portable credential would assist employers to match the right person with a

job. A companion program called KeyTrain was a curriculum that prepared users for the WorkKeys assessment.

The subcommittee liked the concept. Led by the chamber, the presenters agreed to create a proposal to address a self-sustaining workplace readiness program with built-in accountability measures to present to the subcommittee in the new year.

2008–2011 Strategic Plan

It was time to develop a new strategic plan, and so the board held a planning retreat in November facilitated by Dr. Loretta Dodgen, of Multiple Choice Inc. The board adopted its first vision statement: “To be a leader in the philanthropic community by facilitating tangible, positive change in Gaston County at the root cause level and closely adhering to our directive to put money ‘where it is needed most and will do the most good.’”

The board identified three goals for the next three years: 1) to facilitate real, positive change in Gaston County through the philanthropic partnership, taking a proactive leadership role as the voice of accountability and definable results while continuing the historical response to community needs in the designated areas of religion, health, education, culture, and other areas; 2) to ensure accountability in the annual grant process by reviewing and modifying policies and procedures as needed, and to promote accountability through recipients’ reports to the board; and 3) to increase resources to support the mission and achieve the vision by growing the corpus to \$10 million. Action steps included articulating the foundation’s niche; informing the general public and the donor community about the work of the foundation; maintaining effective leadership for the foundation; creating a written history of the Glenn family; developing marketing materials to promote planned giving; establishing a succession plan for the executive director; and identifying attributes of directors to assure that quality individuals served on the board. There was much to do.

CHAPTER 12

Philanthropy Initiative

2008–2011

Martha Eddins succeeded Malinda Lowery as board chairperson in 2008. Joining her as officers were Patrick Perryman, vice chairperson; Jane Sumner, secretary; and Tim Paschall, treasurer, as Patrick and Tim began their second three-year terms. Malinda had just become chairman of the Gaston Regional Chamber board of directors and accompanied Elyse Cochran (formerly Hillegas) to the philanthropy subcommittee meeting on March 7. Other guests present were Donna Lockett, executive director of Gaston Together; Denise McLean, executive director of secondary middle education for Gaston County Schools; Linda Greer and Joy Morrow, from Gaston College; and Cathy Kenzig, executive director of Alliance for Children & Youth. Cathy chaired the Education/Workforce Development Action Team of Gaston 2012, the county's ten-year economic development strategic plan based on a comprehensive economic development study (CEDS) completed in 2002. Additional collaborative partners included the Gaston County Economic Development Commission and the North Carolina Employment Security Commission, and the Education/Workforce Development Action Team. Because employers wanted a pool of employees with post-secondary education, the collaboration focused on producing an educated workforce.

Workforce Development Initiative

The vision of the collaborative effort was that Gaston County would be the preferred site for economic development, have a nationally certified workforce, become a national model for workforce development, and exemplify effective collaboration. Its goals were to retain and attract business, give citizens the opportunity to prosper economically, promote a higher value on education, and produce a lasting legacy for economic development transformation.

The proposal's components included KeyTrain assessment of eighth-graders to assist them in choosing their diploma paths; WorkKeys job analyst/profiler to identify specific job skills and qualifications required for various positions in the workplace; and WorkKeys career readiness certification to provide a portable credential of an individual's workforce preparedness. WorkKeys would provide targeted training to enhance a worker's current skill levels for career advancement. At the time, WorkKeys certification was available only through Gaston College and only to people over 18 because of the college's minimum age requirement. Vital to the program's success was retention of high school students through graduation and retraining and certifying older workers, who had no diploma or GED, with career readiness certificates. The program would provide staff to work with Gaston County Schools, Gaston College, and employers, to determine what skills were needed at a workplace in order to find potential employees.

The approximate budget for three years was \$600,000, within the partners' three-year projections. Accountability would be accomplished through student and business measurements on a regular basis by the chamber. In order to incorporate all aspects of the plan, the timeline for the project was five years. The presenters hoped that area businesses would quickly recognize the benefits of the WorkKeys program and want to financially support the initiative in the long term. The reason they could not become evident within months.

Foundation representatives shared information from the presentation with their respective boards. Following their feedback, a major modification was made. The program would offer WorkKeys to GED and adult high

school students in order to attain more immediate results for the workforce. The three boards approved the initiative, and the Gaston County Manufacturers Roundtable endorsed it. The subcommittee set July to present the initiative to the philanthropy partners.

Biggers Mural

On April 6, 2008, Steven Miotto traveled to Gastonia with his crew and installed the Biggers mural over several days. Planning for the highly anticipated dedication ceremony and unveiling was done by a committee that included Ring Torrence Stafford, fundraising chair; Carol Lowry representing the Gaston Art Guild; Ann Tippitt, now director of the Schiele Museum; and at-large members Caroline Garrison, Juanita Gingles, Barbara Voorhees, and Debbie Windley, along with Hunter Bretzius and Will MacDonald of the *Gaston Gazette*.



“This Little Light of Mine,” a mural made of mosaic tile, hangs on the Garrison Boulevard facade of the Schiele Museum. It is a tribute to John Biggers (1928–2001), a Gastonia native and internationally known artist, who grew up in the Highland community. The project was started by the Piedmont Chapter of the Links Inc. and joined by a group of individuals interested in the arts. The foundation’s bookend grants in 2000 and 2007 helped pay for the mural and enabled it to be shipped to Gastonia and installed. Courtesy of the Schiele Museum of Natural History & Planetarium.

On April 13, 2008, on what would have been John Biggers's 80th birthday, an extraordinary program took place at the Schiele Museum as citizens and art lovers celebrated the unveiling of "This Little Light of Mine." Edward D. Sadler, a member of St. Stephens AME Zion Church at Unity Place and immediate past superintendent of Gaston County Schools, served as master of ceremonies. Speakers included John Biggers's widow, Hazel, who traveled from Houston, Texas, for the presentation. She spoke of how her husband had treasured his Gastonia roots and how much she appreciated this recognition. B. E. Noel, a protégé of John Biggers and owner of the Noel Gallery, in New York City, spoke of his influence on her career. The mass choir from St. Stephen's AME Zion Church provided musical entertainment, singing "This Little Light of Mine," among other selections.

Ring Stafford officially presented the mural to Mayor Jennie Stultz, who accepted it on behalf of the City of Gastonia. In turn, the mayor gave Hazel Biggers the key to the city. Attendees moved outside for the unveiling of the mural and returned inside to enjoy a reception hosted by members of Piedmont Chapter of the Links, whose vision had become reality after eight years.

Grant Distributions: 2008

When the board met in April to review 2008 applications, it set aside 20 percent of the minimum distribution, or \$52,040, for the philanthropy initiative, leaving \$208,490 for traditional grantmaking. At the conclusion of deliberations, one grant of \$5,000 went to Belmont Abbey College for the cost of a limited-edition publication of *The Life and Art of Ralph Ray, Jr.* by Robert D. Tompkins and Donald R. Beagle. Robert Tompkins had never forgotten the Ralph Ray Jr. exhibit at the Gaston County Museum a decade earlier, when he made a commitment to learn more about the artist. He marveled at how much Ray accomplished in his short life and rued how much more he could have accomplished had he lived longer. Tompkins was determined to publicize Ray's artistic talent, but the assignment proved more difficult than anticipated, since most works were housed in private collections. Teaming up with Donald Beagle, Belmont Abbey's library director and a photographer, the two located and made digital photographs



Children participated in “A Taste of the Arts” performance in 2008 at the new facility for Gaston School of the Arts, the former Armstrong Presbyterian Church on Union Road. Courtesy of the Glenn Foundation archives.

of Ray’s paintings from homes and offices of over twenty owners, culminating in the book that included Ray’s biography and images of his work.

The board granted funds to the Presbyterian Weekday School at First Presbyterian Church for a new half-day kindergarten program; to Gaston Literacy Council for the Gaston Families Read program; to Gaston Concert Association for the Pianafiddle duo-pianist performance for fifth-graders in all the public schools; and to Gaston School of the Arts for renovation costs needed to complete the transformation of the former Armstrong Presbyterian Church on Union Road into a new arts school facility. The School of the Arts left Unity Place and in a short time was serving over 250 students of all ages, offering art classes, theater, instrumental instruction, and meeting space at a more visible location.

Grants went toward the cost of recreational improvements to the new

Goat Island Park on an island in the South Fork River at the Town of Cramerton, which would become part of the Carolina Thread Trail. The island would eventually be reached by a pedestrian bridge over the river. Another grant went to the Gaston County Schools to help underwrite the cost of a county-wide science fair in 2009. The Gaston County Health Department used its grant to conduct a quality-of-life survey and community health assessment. Notification letters to grant recipients included reference to a smaller grant pool due to the community-wide philanthropy initiative and its potential to reduce needs across the community in the long term.

Increasing the Corpus

To prepare for the ultimate goal of encouraging outside contributions, the foundation secured a solicitation license from the North Carolina secretary of state. Cherry Bekaert & Holland was now performing an audit to give potential donors assurances that the foundation's finances were being handled properly, although new auditing standards required more comprehensive documentation of investments and raised the cost significantly.

In June, Richard Rankin, still the long-range planning chair, arranged a meeting between the finance committee and Dale LeCount, of the Presbyterian Foundation, in Charlotte, to learn how the foundation could benefit from LeCount's expertise in planned giving. LeCount explained that a formal connection with a Presbyterian church was needed in order to use the services of the Presbyterian Foundation, but that the requirement of a representative on the foundation board from First Presbyterian Church might suffice. After the meeting, committee members realized that they needed to create a niche to generate interest in giving to the foundation. They also needed to discuss planned giving in greater detail with John Granzow and some of his contacts before further considering the Presbyterian Foundation.

Launching the Philanthropy Initiative

On July 9, 2008, the Glenn Foundation hosted a highly anticipated meeting at the Gaston Country Club to introduce the philanthropic initiative. Fifty-eight representatives from the boards of directors of the Community and

First Gaston foundations, other foundations, philanthropists, key leaders in education and business, and the key collaborators learned about the new initiative, called Diploma Plus. The project planners had arrived at this name since it promoted a high school diploma plus a career readiness certificate.

As the foundation's chairperson, Martha Eddins welcomed the group and introduced the initiative. Presenters included Elyse Cochran; Les Harrison, an ACT-licensed WorkKeys job profiler; Cathy Kenzig, of the Education/Workforce Development Action Team; and Donna Lockett, of Gaston Together. In projecting outcomes for the first three years, key goals were to reduce employee turnover rates, engage 4,000 new KeyTrain workers per year, promote the Diploma Plus initiative to high school drop-outs, issue 500 career readiness certificates per year, increase the number of employment-ready inmates in the Gaston County jail, and promote the initiative through a countywide marketing program. The Gaston Regional Chamber would contract with the Gaston 2012 Workforce Development Action Team for the first three years of the initiative, and Gaston Together, housed at the chamber, would be the fiscal agent.

Following a question-and-answer period, the foundation hosted a reception, which gave attendees an opportunity to discuss the proposal and ask questions informally. When the reception concluded, the foundation board met, and the directors approved the joint, three-year philanthropic initiative, officially voting to commit 20 percent of allocated grant funds to the program from 2008 to 2011. The board also agreed that continuation funding depended on the program's annual progress. The boards of the partner foundations soon made the same commitment.

On September 5, 2008, the Glenn Foundation hosted a press conference at the City Club of Gastonia to introduce Diploma Plus to business and community leaders. Richard Rankin and Donna Lockett explained that the initiative met the philanthropists' criteria to address economic development in Gaston County, had the potential for a county-wide impact with both immediate and long-term benefits, would bring about significant and lasting change, include built-in accountability measures, and help unemployed adults get additional job training to assist them in their job searches.

The chamber had decided to trademark the name Diploma Plus and was surprised to learn that the Bill and Melinda Gates Foundation had already registered the term. The local initiative became known as Gaston Career

Climb, with its logo, a ladder. Gaston Career Climb was projected to run from October 1, 2008, to September 30, 2011.

Recession

Just as the program kicked off, the stock market had its worst drop in history, and the nation fell into a recession. Gaston County, its manufacturing base already struggling, was hit hard. On October 8, 2008, the finance committee held a called meeting with John Granzow to receive an update on the status of buyout bids for Wachovia by Citigroup and Wells Fargo and to discuss foundation investments in Wachovia Securities. When the board met for the November 6, 2008, annual meeting, assets were further reduced when the auditors announced that the \$250,000 loan to the White-water Center was overstated and assessed the present value at \$187,600.

In one additional meeting on December 11, 2008, to discuss the financial picture, the board voted to honor the foundation's multiyear commitment to Gaston Career Climb but made a historic, wrenching decision to suspend 2009 grantmaking in order to preserve assets for future years. Directors set aside \$50,000 for the second year of the philanthropy initiative but limited other spending to office expenses only. Directors were comforted by the thought that the philanthropy initiative would spread foundation funds across the county and have advantages long-term, but the decision was difficult when people were hurting.

The foundation issued a carefully worded statement on its website and in a letter to past and current applicants: "Due to current conditions of the financial markets and economic projections for 2009, the Board of Directors of The Carrie E. and Lena V. Glenn Foundation has suspended its normal grantmaking process and will not accept grant requests for the 2009–2010 grant cycle. The foundation will continue to support its major, multiyear philanthropy initiative to train our county's workforce. The Board will consider resuming its traditional grantmaking process for 2010 at a later time."

That winter, United Way, with financial support from the Community Foundation and Glenn Foundation, sponsored a three-part educational series for county nonprofits, which had been planned before the financial crisis. In December 2008 and in January and March 2009, participants learned about the sponsoring foundations and their practices, board recruitment,

roles and responsibilities of nonprofit boards and staff, running effective meetings, parliamentary procedure, succession planning, strategic planning, and planned and endowment giving. The series was well-attended and provided support to community nonprofits during troubled economic times.

Foundation assets, which on December 31, 2007, had been \$7,531,874, were now valued at \$5,338,546. Assets of the partner foundations also dropped. At the January 13, 2009, board meeting, John Granzow predicted that the recession would likely be prolonged and that making up losses in investments would take a long time. He recommended that the foundation stay the course with its asset allocations.

Gaston Career Climb . . . Off and Running

Despite the depressed economy, Gaston Career Climb was off to a great start. In the first month after the October 1, 2008, launch, the chamber hired Ed Smith as Gaston Career Climb director and Patty Crawford as marketing director. Patty made presentations about the initiative to the Gaston County Board of Education, school principals, Gaston College, Gaston County Personnel Association, elected officials, and county commissioners. Gaston Together and the chamber formed an advisory board of participants from foundations, business, and education to provide feedback and monitor progress.

Between 2006 and 2008, Gaston College issued 375 career readiness certificates. In its first three months, Gaston Career Climb issued 194, with over half at the silver level. These results were encouraging. Local businesses began to *Recognize* the importance of a career readiness certificate, *Recommend* for employment a candidate holding a career readiness certificate, or *Require* a career readiness certificate for hiring or promotion, as Wix Corporation had long done. Early supporters were American & Efrd, Daimler (Freightliner), Danaher Tool Group, the Eaton Corporation, and Firestone Fibers & Textiles Company. The three philanthropic partners held a second county meeting on April 23, 2009, to provide an update on the initiative, and attendees were pleased with the results. The meeting planted additional seeds of interest among company representatives.

Project partners provided a number of in-kind gifts, but the critical

element to long-term success was making Gaston Career Climb self-sustaining. Failure would darken the potential of the next philanthropy project. The chamber was totally focused on the program's success and sought funds aggressively, but companies could only begin making financial contributions as the economy improved and they began hiring again. Losses in assets forced the philanthropic partners to reduce their contributions for years two and three, but as the leader of the initiative, the foundation remained steadfast in committing \$50,000 each year. Directors contemplated whether researching a new three-year project was realistic if current conditions continued, and discussed the possibility of extending foundation funding beyond the original three-year commitment in order to sustain the program.

In a cost-saving measure, only Barbara attended the Southeastern Council of Foundations Conference, in Memphis in November. The board suspended printing the 2008–2009 annual report, using the website to convey annual report contents and a report on Gaston Career Climb.

Attributes of Directors

Because there was no grant cycle in 2009, Martha proposed using board meetings to work on the strategic plan, beginning with developing a directors' succession plan. The board spent much of its April 30, 2009, board meeting identifying the characteristics of the current board members and areas of expertise needed in new directors. The board did not intend that every director possess every attribute, but identifying attributes would guide the selection of future directors to assure that they were well-rounded in their experiences and skills and able to guide grantmaking decisions effectively. After the brainstorming session, Malinda put the information in final form, and the board adopted the following guidelines to direct future nominating committees in their selection of directors.

Attributes of Directors

1. Demonstrates an interest in the Gaston community
2. Evidences a record of community experience and involvement
3. Appreciates and values Gaston County; its people and its potential

4. Is proactive and visionary in community endeavors
5. Understands and values collaboration
6. Appreciates an integrated and collaborative approach in addressing community problems
7. Demonstrates financial acumen with regard to nonprofits and foundations
8. Possesses knowledge of the legal aspects of nonprofits and foundations
9. Possesses expertise and experience in the following categories of funding targeted by the Glenn Foundation: Arts/Culture, Children/Youth Services, Civic, Education, Environment, Health/Science, and Human Services
10. Possesses financial experience with granting organizations
11. Respectfully considers the values of the Glenn sisters, i.e., self-reliance, thrift, hard work, integrity, high ethical standards in consideration of projects/institutions funded by the Glenn Foundation
12. Embraces a vision for Gaston County consistent with the values of the Glenn Foundation
13. Thinks strategically and is open to change
14. Demonstrates a personal interest in the work of the Glenn Foundation
15. Desires what is in the best interests of the community
16. Demonstrates openness and respect for different perspectives among members of the board of directors
17. Embraces the diversity of the community with regard to individuals, programs, projects, and perspectives
18. It is beneficial for a director to be a resident of Gaston County (added in 2011)

Since Barbara worked alone, another of the action steps of the new strategic plan was to create a succession manual (or emergency road map) of daily activities for the position of executive director. Barbara spent many hours creating a manual that covered all aspects of her responsibilities. She fondly called it “Hit by the Bus,” as in, “What would happen to the foundation if Barbara were hit by a bus?” She hoped anyone could pick it up and learn her duties. She updated the manual annually.

A Quarter-Million-Dollar Loss

The US National Whitewater Center had been open for two summers and was making money, but with the financial crisis, not enough to repay its loans to the senior lenders. The center called a meeting for July 22, 2009, to discuss a restructuring proposal. The senior lenders were offering the Whitewater Center a voluntary debt-restructuring proposal to reduce their debt to \$12 million, which an outside consulting firm determined that the center could handle. In so doing, senior lenders, whose interests came before the community development lenders, insisted that every single community development lender, like the foundation, terminate its loan agreement and treat their loan either as a charitable contribution or as bad debt. Anything short of a unanimous agreement meant Chapter 11 bankruptcy for the Whitewater Center.

On August 3, 2009, directors held a special meeting to discuss the situation after Jack Drum and Cherry Bekaert & Holland's tax specialist reviewed all documents. Before agreeing to the request, the board insisted that the Whitewater Center provide a letter of acknowledgment for the \$250,000 gift and unpaid interest for its tax records and holding the foundation harmless for any future costs. With these assurances, the board voted to make a gift of the \$250,000 loan and unpaid interest. The foundation's advisors and directors knew from the start that this outcome was possible, but still hoped the investment would be viewed as good over time. Eventually, all community development lenders agreed to the restructuring plan, saving the center from bankruptcy. With the land having such a specialized use, bankruptcy would have helped no one.

The board was now required to review the Form 990PF tax return before it could be signed, and so the trustees reviewed it ahead of the October annual meeting. At the meeting, the finance committee presented an updated investment policy statement including a new asset allocation: growth assets 55 percent, risk reduction assets 35 percent, and inflation protection assets 10 percent. As Jane Sumner and Rick Craig began their second three-year terms, assets began to grow again.

On September 11, 2009, a happy occasion occurred with a celebration of the publication of *The Life and Art of Ralph Ray, Jr.* with a reception and exhibition of about forty pieces of Ray's works at the Schiele Museum.



A foundation grant in 2008 helped offset the cost of printing 700 copies of a limited edition book about Gastonia native Ralph Ray Jr., artist and illustrator, in order to provide a permanent historical record of Ray's life and work. The book featured many of Ray's works, most of which were in private collections. Ray was the nephew of Mena Ray Glenn, Carrie and Lena Glenn's sister-in-law, who married their older brother, Dr. Lucius N. Glenn. Courtesy of the Glenn Foundation archives.

David Tompkins and Donald Beagle made remarks and autographed books. Ray's youngest sibling, Ann Ray Pendergrass, of Greenwood, South Carolina, as well as several family members, were present. As the mayor was out of town, City Councilman John Howren presented Pendergrass with a key to the City of Gastonia in honor of her brother's life and artistic accomplishments.

Changing of the Guard

The time had come for Martha Eddins, Malinda Lowery, and Richard Rankin to rotate off the board. The three had each contributed to the foundation in meaningful ways and would be missed. Their successors, Colleen M. Bridger, Laura G. Lineberger, and Julia M. Shovelin, were seated at the end of the first meeting in 2010.

Colleen Bridger, a Michigan native, became director of the Gaston County Health Department in 1997. She held a bachelor's of international development degree from the School for International Training in Vermont, a master's of public health degree from the University of North Carolina at Chapel Hill, and a doctorate in health services research from the University of North Carolina at Charlotte. She was a member of Gastonia East Rotary Club and of St. Michael Catholic Church.

Laura Lineberger held a BBA in marketing from the University of Georgia, and served as the marketing director for Eastridge Mall and then for Matthews Belk department store. She changed careers after receiving an AAS in health information technology, becoming a registered health information administrator (RHIA) and analyst of corporate compliance at CaroMont Health. Laura served as an elder at First Presbyterian Church, was a member of the Rotary Club of Gastonia, and had extensive volunteer involvement. Her mother was Caroline Garrison.

A Gastonia native, Julia "Julie" Shovelin, served as attorney for the Gaston County Board of Education from 1998 until her retirement in November 2009. She received her undergraduate degree from Wake Forest University and taught in public school before returning to Wake Forest to earn a law degree. An active community volunteer, Julie chaired the boards of five local nonprofits before her service on the Glenn Foundation board, and was a member of First Presbyterian Church and the Rotary Club of Gastonia.

On January 20, 2010, Martha's last meeting as chairperson took place, and she welcomed the three incoming directors as observers along with three special guests: Donna Lockett of Gaston Together, Career Climb director Ed Smith, and Gwen Moon, who provided staff support. The foundation did not ordinarily invite guests to a board meeting, but it had a large stake in Gaston Career Climb. The program had completed a full year of operation three months earlier, and directors wanted an update.

Gaston Career Climb Success

Gaston Career Climb had enjoyed a successful first year, stated the presenters, with a wide partnership engaged in workforce development. There had been a bump in the road when Chamber President Elyse Cochran resigned and moved to Georgia, but Smith stepped in as interim chamber president.

Although now dividing his time between both jobs, he remained committed to Gaston Career Climb.

The Gaston Career Climb advisory board represented a large group of partners all involved in promoting the career readiness certificate as an economic development tool. It met quarterly to review report cards that Gaston Together compiled, tracking progress of each of the goals set for the initiative. The program exceeded nine of ten goals in its first year, surpassing the number of career readiness certificates issued and the number of new KeyTrain users, the majority of whom came from adult high school and GED programs at Gaston College. While the numbers were difficult to track once a certificate holder left Gaston College, of those who could be tracked, 38 percent (138) of holders of six months or more were enrolled in higher education, and 41 percent (152) were employed. High school programs at Hunter Huss and Bessemer City high schools were successful. The Gaston County Sheriff's Office was tracking recidivism for thirty inmates who earned career readiness certificates in jail. Through the community college system, funds were available for retraining, and career readiness certificates provided a credential for workers to earn while enrolled in college courses.

Since December 2009, Gaston Career Climb received \$20,000 from the David Belk Cannon Foundation and \$4,000 from Duke Energy, in addition to funds contributed by the sponsoring foundations, but most businesses still were unable to contribute financially. The additional funds purchased three-year KeyTrain licenses for more high schools and funding for additional certificates at Gaston College at \$30 per test.

Other support came from the Alliance for Children & Youth, Firestone Fibers & Textiles, Gaston College, and the Workforce Development Board, which collectively contributed \$17,000 to pay for a full-page Newspapers in Education advertisement profiling one job every Friday for a year in the *Gaston Gazette*. The ads included the type of training and skills needed for each position profiled.

Smith and Lockett thanked the foundation for initiating the collaboration and for placing trust in Gaston Together and its community partners to execute the program. The board was pleased with the progress.

Difficult Issues

Following the presentation, the board tackled two difficult issues. The first was whether to extend the moratorium on traditional grantmaking to 2010. The auditors had written off the loan to the US National Whitewater Center with the financial statements of June 30, 2009, and so despite the 2009 moratorium, the foundation expended \$250,000 to the Whitewater Center and \$50,000 toward its commitment to the second year of the philanthropy initiative. The directors would approve two additional small grants before the fiscal year ended. They reluctantly voted to extend the moratorium on grantmaking for a second straight year, and hoped that their decision would prove correct for the long-term benefit of the foundation and the community.

The second issue involved the merger of the Boys & Girls Clubs of Greater Gaston, in West Gastonia, and the Gaston Boys and Girls Clubs, on North York Street, which had served children in the Highland community since 1959. As early as 2003, Boys & Girls Clubs of America had approved a merger of the two clubs.

Greater Gaston had borrowed money to renovate and enlarge its building and was paying on its loan. The Gaston Boys and Girls Club had been displaced by expansion of Gastonia's water treatment plant, and although it received compensation from the city, the club had borrowed money to complete the renovation on its new location on North Morris Street. It had been unable to pay more than a token on its loan and was also struggling to pay operating expenses. The Greater Gaston club did not want to merge until the Gaston club was debt-free. The bank holding the Gaston club's note offered to forgive the balance if the community raised \$300,000, and local foundations were being asked to fund a portion of the repayment.

The directors initially thought they should consider support, but the foundation had suspended grantmaking for the year. Any contribution would have to come from the already depleted corpus. The board was also concerned that there appeared to be no coordinated community fundraising effort. The directors decided it would be more appropriate to fund programs and operating expenses following a merger rather than to fund debt reduction. Other foundations felt similarly, and a merger never took place.

Instead, Gaston Boys and Girls Clubs closed its doors, and the Greater Gaston club began serving those children right away.

With the moratorium on grantmaking, the board had ceased making routine discretionary grants to the church. It adopted a new policy stating that the foundation would consider giving discretionary grants to First Presbyterian Church of Gastonia in the years it made grants to the community, with any decision coming at the time of grant deliberations. The intent of the policy was to make official the historic tie between the Glenn sisters and First Presbyterian Church without binding future boards to annual gifts during grant deliberations.

As the board meeting concluded, Martha declared that her service for the previous six years had been her best volunteer experience and that she had greatly enjoyed the relationships. She congratulated new officers Tim Paschall, chairperson, Patrick Perryman, vice chairperson, Jane Sumner, secretary, and Rick Craig, treasurer, and welcomed the new directors, Colleen, Laura, and Julie, as Patrick began his second three-year term.

As they rotated off the board, Martha, Malinda, and Richard could take pride in their six years of leadership at an extraordinary period of the foundation's history. Challenges had included transitioning from indentured trust to corporation, funding the US National Whitewater Center, selecting a fund manager consultant, initiating and supporting the Gaston Career Climb philanthropy initiative, changing from a financial review to an audit, and approving a conflict of interest statement. Their vision and leadership were exceptional, and their departure from the board started the tradition of presenting outgoing directors with a Tiffany crystal bowl.

Haiti Disaster Relief

As the three exited the meeting room, chairperson Tim Paschall welcomed the reconstituted board and shared committee assignments for the year. No sooner had he completed his remarks than Martha, Malinda, and Richard reappeared and suggested that the board consider a contribution to Haitian relief efforts. A devastating earthquake had occurred in Haiti the week before, leaving 1.5 million Haitians homeless and capturing the attention of the world. The three knew they had no authority to make the request but felt it was important to raise the issue. The newly constituted board

approved a discretionary grant of \$5,000, with funds going to the disaster program of the Presbyterian Church (U.S.A.). The meeting concluded with a luncheon to welcome new directors and bid farewell to the three outgoing directors.

Increasing the Corpus . . . or Not

With no grant cycle for the second consecutive year, the board did not meet again until a called meeting on May 21, 2010. Patrick Perryman, his new doctorate in hand, had accepted a call to First Presbyterian Church of Beaufort, South Carolina, and resigned from the board. The board quickly extended an invitation to the Rev. Dr. John Lennig Frye Jr. to fill Patrick's unexpired term. John had served as senior pastor and head of staff at First Presbyterian Church since August 2007. Because he was filling an unexpired term, he would be eligible to serve two three-year terms. Laura Lineberger filled Patrick's seat as vice chairperson.

John was a Davidson College graduate and an avid fan of Davidson athletics. A former high school English teacher and coach, he worked at his family's business in Robbins, North Carolina, serving as town mayor before heeding a call to the ministry. He earned a master's of divinity degree from Union Theological Seminary in Richmond, Virginia, and a doctorate of ministry from Columbia Theological Seminary, in Decatur, Georgia. John served churches in Columbia and Aiken, South Carolina, before arriving in Gastonia.

All-America City Success

It had been ten years since the City of Gastonia last entered All-America City competition, and the city applied anew. The city staff, Mayor Stultz, and Barbara prepared the application, and Gastonia was one of twenty-seven finalists. Once again, some in the delegation could not afford the cost, and the foundation made a discretionary grant of \$4,000 to help send the 2010 team to Kansas City in June. The Gaston Career Climb initiative was one of three featured stories. Gastonia native and NBA star James Worthy made an appearance at the presentation, clinching a third victory for the City of Gastonia and its second in ten years. The grant raised



Members of the 2010 All-America City team celebrated Gastonia's second victory in ten years. Courtesy of the Glenn Foundation archives.

foundation expenditures to \$309,000 for the first year of the moratorium on grantmaking.

The final sticking point to completing the 2008–2011 strategic plan regarded increasing the corpus to \$10 million, a goal conceived before the market downturn in 2008. Although the foundation held discussions with the Presbyterian Foundation and the Granzow Consulting Group, the directors were challenged with how to attract donors who had no prior association with the foundation. A private foundation was not set up to receive designated funds, and people would likely be reluctant to give unless the foundation defined its niche and economic conditions made contributing

more attractive. Acknowledging the reality that active solicitation would take money and staff time, the board agreed to table indefinitely this section of the plan. Then, since one reason the board began receiving an audit was to assure prospective donors that the foundation operated at the highest standards, the board agreed to return to a financial review since the majority of assets were audited through the fund manager.

The finance committee thought it was a good time to put the financial review out for bids, and secured three quotes from local CPA firms. Cherry Bekaert & Holland secured the bid, maintaining its historic tie with the foundation that began in 1987. Even though the board tabled fundraising plans, it directed Barbara to renew the North Carolina solicitation license since doing so involved no cost.

Since 2000, the foundation leased office space at the Union Commons complex and during that time had three landlords. The most recent was Dixie Fund Inc., with its excellent managing partner appropriately named Grant Norman. The lease was expiring in 2010, and Tim assisted with the negotiations. In exchange for a five-year lease, the office received a cosmetic facelift that pleased both parties. The foundation installed a security system shortly thereafter.

In October, when the board met for the annual meeting, unrestricted assets on September 30, 2010, were \$6.32 million, up 9.25 percent for the quarter. John Granzow still expected a prolonged recovery but was pleased to acknowledge that the economy was finally doing better. The board honored its \$50,000 commitment for the third year of Gaston Career Climb and made two other small grants for a total of \$51,500 in 2010. The board agreed to resume the traditional grant cycle in 2011.

In November, Rick, incoming chairperson, with Laura, Jane, and Barbara, attended the Southeast Council of Foundations conference, in Mobile, Alabama. In the closing plenary, Mark Kramer, founder and managing director of FSG Social Impact Advisors, spoke on catalytic philanthropy, a theory that says philanthropy is not about giving away money, since merely granting money does not really solve problems. Instead, a foundation should focus on the solution but serve as the catalyst to get others to band together to address problems and effect tangible results. The foundation's delegation realized that the Gaston Career Climb initiative was a splendid example of Kramer's catalytic philanthropy.

CHAPTER 13

Celebrating Forty Years

2011–2012

Gaston Career Climb continued to exceed its goals. At the end of year two, individuals earned 1,279 career readiness certificates, and 8,906 others prepared for the exam using KeyTrain. The Gaston County jail ordinarily had a 70 percent recidivism rate, but inmates with career readiness certificates had a 25 percent rate. The county's three other chambers of commerce, Montcross in Belmont, Bessemer City Area, and Cherryville, endorsed Gaston Career Climb's goals and objectives, and 109 Gaston County employers signed resolutions of support. Gaston Career Climb and chamber staff designed and distributed marketing materials and continued to make presentations about the initiative to public school personnel and PTAs. After making the third and final payment of \$50,000 to Gaston Career Climb, directors agreed to continue supporting the initiative and asked Gaston Together, the fiscal agent, to reapply for the 2011 grant cycle.

When the board met in January 2011, one action step from the strategic plan still had not been accomplished—a written history of the Glenn sisters and their family. Attempts to attract a local historian to the project had not been successful, and so the action step remained unmet.

Tim Paschall rotated off the board after six years. Among his many contributions were his interest in marketing that brought about a new logo and an updated website, support of Gaston Career Climb, an All-America City win, and an office alarm system. He negotiated improvements to the office during the lease renewal at no cost to the foundation.

The new chairperson, Rick Craig, served with Laura Lineberger, vice chairperson; Jane Sumner, secretary; and Tim Efird, treasurer. Both Tim Efird and John Frye began their first three-year terms, serving with Colleen Bridger, Laura Lineberger, and Julie Shovelin. Directors and officers assumed their duties at the end of the January 2011 meeting.

H. Timothy Efird II was a Gastonia native and graduate of the University of North Carolina at Chapel Hill with a degree in history and an MBA from McColl School of Business at Queens College. He also proudly held a Class A commercial driver's license. Tim was president of Standard Distributors in Gastonia, served as a Sunday School teacher, deacon, and elder at First Presbyterian Church, and was heavily involved on the boards of the Gaston Regional Chamber, the Schiele Museum, and Gaston Literacy Council, and the local advisory board of BB&T. During his tenure, he became president of the North Carolina Beer and Wine Wholesalers Association.

Assets had risen 16.16 percent in 2010 and on January 18, 2011 were \$6.8 million. Despite the growth, the directors decided to ease back into grantmaking with a conservative allocation of \$150,000. This would be the first grant process for Tim Efird, John Frye, Colleen Bridger, Laura Lineberger, and Julie Shovelin, as grant deliberations resumed in April after a two-year hiatus.

Grant Distributions: 2011

The board allocated the full \$150,000 to sixteen agencies. Included in the total was \$30,000, fourth-year funding to Gaston Together for Gaston Career Climb, as the foundation continued its commitment to contribute 20 percent of the grant pool to the initiative. The notification letter to Gaston Together encouraged the agency to seek more financial support from the business community to keep the effort progressing.

The board made a \$22,000 grant to the Schiele Museum for a new addition, soon to be called the Matthews Belk Cannon Environmental Studies Center. It boasted the first green roof in the county and was one of the county's first Leadership in Energy and Environmental Design (LEED) gold-certified buildings. The board granted funds to the Arc of Gaston County for Kamp Kaleidoscope, a summer day-camp experience for children and young adults with developmental disabilities; Gaston County

Department of Social Services for a bilingual court-advocate position to assist those staying at the Shelter of Gaston County; and American Red Cross–Gaston County Chapter for disaster services. The board granted operating expenses for Cornerstone Christian Center, a residential substance-abuse recovery program for men, that later became a part of the Alternative Community Penalties Program.

After the Schiele Museum received its grant, Debbie Windley, director of development, notified the board that the Schiele had created a LEEDership Donor recognition category beginning at \$25,000 and asked the foundation to consider adding \$3,000 to its grant to achieve this recognition. As it happened, the directors had set the grant allotment without regard for the minimum distribution until Jim Ratchford notified them that they needed to grant \$5,000 more before the fiscal-year close on June 30, 2012. The board approved \$10,000 in additional funds to the Schiele, raising the foundation's contribution to \$32,000 and the distributable amount to \$160,000.

On June 9, 2011, Caroline Garrison died in Gastonia. She lived a full life as a nonprofit professional and community volunteer and as a mentor to many women in Gaston County. Her death was a loss to the community she served so faithfully. The board honored her life and work with a memorial contribution to United Way of Gaston County.

In October 2011, the Gaston Regional Chamber absorbed Gaston Career Climb into its plan of work with a financial commitment of \$20,000. Gaston Together continued to provide grant writing and fund development through 2017. Despite losses of assets suffered by the philanthropic partners in 2008, they contributed \$480,936 over three years. Additional contributions from the David Belk Cannon, Belk, Duke Energy, Wells Fargo, and the Pearl Dixon Balthis foundations, and the Newspapers in Education partners raised the total to \$546,124, closer to the initial projections of \$600,000. At the end of the funding period, the program was in three high schools and was slated to expand to all of them.

Newly Constituted Board of Directors

In October 2011, Colleen Bridger accepted a position as health director of Orange County in Chapel Hill, North Carolina, and resigned. The board

elected Charles W. Gallman Jr. to fill Colleen's term that expired in 2013. Like John Frye, Charles was eligible to serve two additional three-year terms. Rick Craig and Jane Sumner rotated off, and directors elected Gastonia natives Emily C. Craig and Robert H. Collis to succeed them. The three new directors received an orientation before the first meeting in 2012.

Rick presided at the February 2012 meeting, when the board approved a distribution of \$250,000 for the 2012 grant cycle. Laura assumed the chairmanship at the end of the meeting. Serving with her were John Frye, vice chairperson, Julie Shovelin, secretary, and Tim Efird, treasurer. The board rounded out with Charles Gallman, Emily Craig, and Rob Collis.

For several years, the vice chairperson had succeeded the board chair, but when the nominating committee presented this slate, it noted that the office of vice chairperson was not equivalent to chair-elect. The bylaws did not provide for a chair-elect, but neither did they prohibit the vice chairperson from becoming the chairperson. The unofficial tradition of succession has continued.

Charles Gallman grew up in Mount Holly, earned a degree in finance from Clemson University, and a master's of taxation degree from the University of South Carolina. He began his career as a corporate lender with North Carolina National Bank (NCNB), but was now a director with Grant Thornton LLP. He was a certified public accountant accredited in business evaluation, a certified financial planner, and an active member of First Presbyterian Church as a deacon, elder, and youth leader, and a member of many committees. A past president of the Gastonia (Gaston County) Jaycees, Charles had long service with the Piedmont Council Boy Scouts as scoutmaster of Troop 11 sponsored by First Presbyterian, and as district chairman.

Emily Craig was a Gastonia native and communications specialist for Gaston Hospice. During her board service, she became physician liaison for CaroMont Health. A graduate of Meredith College, where she majored in English and political science, Emily was a longtime board member and former chair of the American Red Cross–Gaston County Chapter, and a charter member and first president of the Gastonia Evening Rotary Club. She had served as a deacon and elder at First Presbyterian Church and was involved in many church and community activities.

Rob Collis was president of Collis & Associates, CPAs, and like Charles Gallman brought financial expertise to the board. A graduate of Belmont

Abbey College, he had a long record of faithful service to First Baptist Church in Gastonia as a deacon, Sunday school teacher, and youth leader. Rob had chaired the boards of Gaston Arts Council, Girl Scouts of the Pioneer Council, and Habitat for Humanity, and was a founding member of the Gastonia Police Foundation. He was a past president of the Rotary Club of Gastonia.

Grant Distributions: 2012

Thinking ahead, the board realized that the foundation would celebrate a forty-year milestone of grantmaking on October 17, 2012, and wanted to mark the occasion with a special event. Laura appointed Emily to chair an anniversary celebration committee, and she, Laura, and Barbara held several meetings to put a plan in place for the fall of 2012.

In May, another grant cycle started. As had become the practice, directors discussed the merits of each application in the first round without a discussion of dollars, reviewed and narrowed decisions in the second round, and assigned dollars in the final round. When the process ended, the board held a separate vote on each application and noted abstentions due to conflicts of interest. When it concluded, the board made twenty-eight grants totaling \$311,000.

Directors awarded Gaston Together \$20,000 in what became the final payment to Gaston Career Climb, with foundation contributions totaling \$202,040 over five years. The Stanley Town Revitalization Corporation received funds toward construction of the new Harper Park, named for Ron Harper, a Charlotte philanthropist and transplant to Stanley. The Gaston Community Concert Band, d.b.a. Gaston Symphonic Band, was able to purchase timpani, concert bells, and music stands with its grant.

The directors granted \$5,000 to the Gaston County Historic Preservation Commission to promote the nineteenth-century Heritage Village at Gaston County Park, and \$5,000 to Gaston School of the Arts for its Youth Orchestra/The Bluegrass Project. Glenn funds helped contribute to a dollar-for-dollar match from an Arts Education in Communities grant from the National Endowment for the Arts. The project also received a grant from the Bluegrass Mountain Foundation.



The all-volunteer Gaston Community Concert Band, doing business as Gaston Symphonic Band, was able to purchase timpani, concert bells, and music stands thanks to a 2012 foundation grant. Courtesy of the Glenn Foundation archives.

2012–2014 Strategic Plan

With the grant cycle concluded, the board reviewed and approved the 2012–2014 Strategic Plan and a new mission statement: “To perpetuate the legacy of the Glenn sisters by providing resources where they are most needed and will do the most good for the greater Gaston community.” The plan established three goals: 1) keep the executive director succession plan updated, address overhead, and review the bylaws and directors’ compensation; 2) examine the Gaston Career Climb philanthropic partnership, determining whether to continue the partnership or identify and implement a new project; and 3) celebrate the fortieth anniversary of grantmaking in October 2012, brainstorm opportunities for the community to contribute funds to the foundation, publish a history of the foundation, and create a marketing plan including greater use of the website, social media, and news outlets to increase the foundation’s profile in the community.



Children in period dress reenact work being done at the 1890s Heritage Village at the Gaston County Park in Dallas, North Carolina, where a 2012 foundation grant was used to create more visibility for the site. Courtesy of the Glenn Foundation archives.

Anniversary Celebration Planning

Emily presented her committee's ideas for the anniversary celebration: a reception to honor the Glenn sisters and to recognize and thank 226 current and former grant recipients, former trustees, and directors on October 17, 2012, forty years from the day the board made its first grants in 1972. The committee decided to hold the event at the new Gastonia Conference Center on Marietta Street (Dr. Martin Luther King Jr. Way) to support both the center and downtown Gastonia.

The committee wanted the board to consider an anniversary gift that would reach the entire county geographically. As they brainstormed, a grant request the board had chosen not to fund planted a seed. Anna Taylor, media specialist (a position formerly called librarian) at W. C. Friday Middle School, in Dallas, had submitted a request for books for her school's library. Her application described the difficulty in keeping library

collections compliant with recommendations from the North Carolina Department of Public Instruction regarding the number of books per student and the average age of the collection. The committee proposed providing a special gift of \$65,000, over and above its regular allocation, to Gaston County Schools, with \$5,000 going to each of the county's eleven middle schools, plus Warlick Alternate School, and Webb Street School for students up to age 22 with intellectual disabilities. The gift would honor Carrie's and Lena's careers as a teacher and a librarian.

The directors embraced the plan and volunteered to assist on the day of the event. With the budget set, Barbara contacted Dr. Lori Morrow, assistant superintendent for curriculum at Gaston County Schools, who enthusiastically endorsed the project. All agreed to keep the monetary gift a secret, with only the directors, Morrow, and a handful of others knowing about it.

In August, Emily and Barbara discussed the marketing plan for the foundation. Emily liked the appearance and content of the website and annual report, but recommended giving Barbara authority to administer the site.

Forty Years of Grantmaking

When October 17, 2012, arrived, present and former trustees along with representatives from 71 recipient agencies were among the 162 guests gathered at the Gastonia Conference Center to celebrate the foundation's fortieth anniversary. Present as well were middle-school media specialists, who had no idea why they were being required to attend; some seemed visibly annoyed. Guests enjoyed a cash bar and refreshments catered by The String Bean in Belmont. Extra touches included a PowerPoint presentation of photographs of past grant-funded projects that Emily created, and gorgeous floral centerpieces that Laura prearranged for the special day.

As board chairperson, Laura served as mistress of ceremonies. John Frye's thoughtful invocation set the tone for the event:

Gracious and Eternal Lord,

We gather this day as grateful people, thankful for all the wonderful gifts from your hand and mindful that you bless your people so that they would be a blessing; especially we are thankful for the fruitful

lives of Carrie and Lena Glenn. We are grateful for their wisdom and generosity, for their love of education and this community, and for the faithful stewardship with which they lived their lives. We are grateful for their vision and are mindful of all the ways you have manifested that vision in benefit to others over these past 40 years. Continue to fulfill your bright hopes for the benefit of others through this foundation, grant that the glad celebration this night merely mirrors in part the joy on high, consecrate this work to your will and way, blessing this time of food and fellowship to the building up of your people and your kingdom, In Jesus's name, Amen.

Laura was pleased to recognize very special guests in attendance: Will and wife Mayme Glenn's grandson David Glenn Thompson and his wife, Betty, of Lincolnton; David's sister, Martha Abernethy Thompson, of Blowing Rock; and their first cousin, Mary Love Boyd Hornbaker, of Charlotte. Founding trustee Hugh Bryant also attended and was recognized, as were the former and current trustees and directors and their spouses.

Laura described to the audience the Glenn sisters' simple lives and frugal habits and how, after their retirement and move to the Presbyterian Home of High Point, they decided while in their 80s to leave their savings to charity. She recalled how the sisters established the foundation in 1971 with a gift of just \$25,000 because they were afraid that they might outlive their income if they left more than that while they were living. The board of trustees had made the first grants on October 17, 1972, after waiting over a year to accumulate enough income to distribute. The first grants totaling \$925 went to three local agencies.

Since the sisters' deaths, said Laura, when the foundation acquired close to \$3 million, it had granted over \$6.5 million to nonprofit organizations, most located in Gaston County. Outside of the legal document that established the foundation, the Glenn sisters' only guidance was to try to have any money they might leave "go where it is needed most and will do the most good." Laura noted that this statement was the tagline on the foundation's letterhead.

In forty years, the foundation had funded 760 separate programs and services—everything from A to Z. To the audience's amusement, Laura gave proof in less than a minute.

- After-school homework assistance
- Bicycle bridges and Boys and Girls clubs
- Concerts and Cancer screenings
- Dental equipment and Drama productions
- Emergency assistance
- Family counseling
- Greenways and Gaston Career Climb
- Heart medications and Historic preservation
- Imagination Library
- John Biggers Mural
- Kaleidoscope Children's Arts Series
- Land protection and Literacy programs
- Medications and Museums
- Nursing assistant training
- Operation Playground
- Partnerships with the Community and First Gaston foundations
- Quality-of-Life survey
- Residential services and River guardians
- Substance abuse education
- Tutors and Tutus
- US National Whitewater Center
- Volunteer training and Visual arts programs
- Willow maze and Wheelchair ramps
- Xylophones
- Youth initiatives **AND**
- Zip lines

When the board of directors pondered a gift to commemorate the fortieth anniversary, Laura explained, it sought something that would honor the founders, reach the entire county, and be significant enough to make a difference to the recipient. Since Carrie spent her working life as a teacher in the Gastonia and Gaston County public school systems, and Lena spent her career as a librarian at the Gaston County Public Library, Laura was proud to announce a gift of \$65,000 to media centers at Gaston County Schools' eleven middle schools, plus Warlick Alternate School, and Webb



Foundation director Julie Shovelin presented a display check of \$65,000, signed by board chairperson Laura Lineberger, to Gaston County Board of Education chairman Mark Upchurch (left) and school superintendent Reeves McGlohon (right) at the foundation's fortieth anniversary celebration in 2012. In its first forty years, the foundation granted in excess of \$430,000 to the public school system. Courtesy of the Glenn Foundation archives.

Street School, representing grants of \$5,000 to each school. These funds were designated for book purchases and other needed library materials.

The media specialists and their principals were shocked and delighted. Laura presented an oversized ceremonial check to Gaston County Board of Education chairman Mark Upchurch and school superintendent Reeves McGlohon. Julie Shovelin, as the former school board attorney, announced the names of the media specialists as they crossed the stage to receive their checks: Belmont Middle School, Linda Cathcart; Bessemer City, Vanessa Griffith; Cramerton Middle School, Dianne Miller; Holbrook Middle School, Marti Morgan; John Chavis Middle School, Teresa Philbeck; Mount Holly Middle School, Pat Cox; Southwest Middle School, Dianne Barber; Stanley Middle School, Cheryl Fox; W. C. Friday, Anna Taylor; W. P. Grier, Casey Reese; York Chester Middle School, Denise Gould; and the principals of Warlick Academy and Webb Street Schools.

Accepting the check, McGlohon recognized the foundation's grants of over \$430,000 to the school system, or about 15 percent of total giving, over

forty years. At the close of the presentation, former board chair Martha Eddins distributed a commemorative gift of Belgian chocolates with the foundation's name and logo imprinted. The guests stayed afterwards to visit and enjoy refreshments.

Over 8,090 teachers and students benefitted from the fortieth anniversary gift. The \$65,000 grant resulted in purchases of 3,270 books, an average of 270 new books for each middle school, plus Wi-Fi access at Webb Street School, where iPads provided more personalized instruction. One month after the celebration, founding trustee Hugh Bryant made a monetary donation to the foundation to honor its growth and community contributions.

On behalf of the family, David Glenn Thompson, Carrie and Lena's great nephew, later expressed how thrilled his family had been to attend the fortieth anniversary celebration and to see so many people in attendance and the impact the foundation had made in the community.

CHAPTER 14

Caring for the Community

2012–2017

Before the end of 2012, Preservation NC announced that after 14 years of seeking a buyer, Camden Development Partners had secured financing to purchase and develop the vacant 600,000-square-foot historic Loray Mill building into upscale loft apartments. Firestone Fibers & Textiles Company had donated the building to Preservation NC in 1998. The Quality of Life Survey conducted by the Gaston County Health Department, in collaboration with CaroMont Health, Gaston Together, and United Way of Gaston County, showed that citizens identified obesity as the county's number-one public health problem, while teenagers in the same survey identified teen pregnancy as their biggest health concern. Fortunately, the Adolescent Pregnancy Prevention Council of North Carolina had received a \$5.8 million, five-year grant from the Centers for Disease Control and Prevention focused on Gaston County, with the goal to reduce the teen pregnancy rate. Called Gaston Youth Connect, the health department staff targeted grant funds to areas where teen pregnancy occurred and provided intensive multi-faceted programs to combat the problem. At the conclusion of the grant period in 2015, teen birth rates in Gaston County decreased by 45 percent compared to North Carolina's statewide decrease of 40 percent in the same time period.

The Gaston Regional Library, which since 1964 had encompassed the libraries in Gaston and Lincoln counties, dissolved, and the new Gaston County Public Library emerged. Ninety-two miles of the Carolina Thread

Trail now extended from Bessemer City to Stanly County. Gaston College opened Early College High School in 2012, where high school students attended an extra year but graduated with a diploma and an associate's degree. Over 80 percent of Gaston County adults over age 25 held a high school diploma or GED, great progress since 1995 when only 61 percent of residents had completed high school or earned a GED.

Five months after the fortieth anniversary celebration, Gaston Together awarded the foundation its 2013 Community Leadership recognition, the Circle of Caring Award, which honored an organization whose work made a significant impact on the betterment of the community and improved the quality of life for citizens throughout Gaston County. It was a fitting tribute and apt conclusion to the anniversary year.

Completion of Gaston Career Climb Initiative

In 2013, the three main philanthropy partners—the Community, First Gaston, and Glenn foundations—ceased funding Gaston Career Climb after five years. Over the duration of the partners' commitment, from 2008 to 2012, 2,347 students and workers achieved career readiness certificates. The WorkKeys assessment became a requirement for all career technical education students in every high school. At graduation, these students began receiving a career readiness certificate and a high school diploma. Gaston County's public school cohort graduation rate would grow from 81.27 percent in 2012–2013 to 88.3 percent in 2016–2017, perhaps as students saw a path for their futures. During this period, 7,000 certificates were issued in the county. Thanks to Gaston Career Climb and the work of Gaston College and other community partners, Gaston County was designated as a Work Ready Community by the North Carolina Work Certified Community Initiative.

In 2013, the Gaston County Health Department and the Department of Social Services merged and became divisions of the new Gaston County Department of Health & Human Services. Gaston Memorial Hospital, purchased from Lucius Glenn in 1946, changed its name to CaroMont Regional Medical Center. The month of April 2013 saw Preservation NC hold open houses for the completed renovations of Lucius Glenn's 1924 City Hospital

into Highland Memorial Apartments on Highland Street, as well as the Armstrong Apartments on Second Avenue. The open houses coincided with the kickoff of renovations at the Loray Mill and the unveiling of the historic road marker commemorating the 1929 workers strike, eighty-four years after attempts to unionize the mill and after years of wrestling over the wording. April also saw the public opening of the 7,700-square-foot Matthews Belk Cannon Environmental Studies Center at the Schiele Museum.

The Community Foundation spearheaded a project it called Artspace Gastonia. Artspace, founded in Minneapolis in 1979, was the nation's largest nonprofit real estate developer for the arts, specializing in rehabilitating old buildings into affordable housing for artists. The Community Foundation had already identified a downtown building that would provide forty-nine live/work units and twenty-nine studios for regional artists. It hoped Artspace Gastonia would help transform downtown Gastonia into a district for the arts.

Board Changes

Julie Shovelin succeeded Laura Lineberger as board chairperson in February 2013, and the board reelected Tim Efird and John Frye to second three-year terms. Joining Julie as officers were John Frye, vice chairperson; Emily Craig, secretary; and Tim Efird, treasurer, with Rob Collis, Charles Gallman, and Laura Lineberger serving with them.

In May, the directors voted to eliminate board compensation, an amount that had remained unchanged since 1986. With money formerly allocated for directors' payments, the board created a directors' discretionary budget line item based on attendance at board meetings, up to four meetings a year. The purpose was to provide a small pool of money the board could use at its discretion to make grants when requests came outside the regular grant cycle. This change was incorporated into the policy and procedures manual in October. The board examined the foundation's social media presence and approved a content management website that Barbara could administer, but did not think creating Facebook and Twitter accounts was practical. In an important change at the October meeting, the board invited Crisis Assistance Ministry to apply again for grants for emergency assistance after a moratorium of eight years.

Grant Distributions: 2013

With \$250,000 to distribute, the board approved twenty grants from thirty-nine requests submitted. It funded \$25,000 for the Community Foundation's new initiative, Artspace Gastonia, the first payment of a five-year commitment, and \$20,000 to help create Lost Hollow: The Kimbrell Children's Garden at Daniel Stowe Botanical Garden, named for Parkdale CEO Duke Kimbrell. The three-acre expansion, to include an amphitheater and pond, was designed by W. Gary Smith Design, a nationally known landscape-architecture firm. The addition opened in October 2014.



The foundation helped fund a three-acre expansion called Lost Hollow at Daniel Stowe Botanical Garden, including a pond and amphitheater that was completed in 2014. Called the Kimbrell Children's Garden, it contained the aviary from Daniel Stowe's estate, which was salvaged, restored, and placed on a rotating turntable in the new section. Children enjoy a spin when they visit. Courtesy of the Glenn Foundation archives.



Two foundation grants in 2013 and 2014 helped fund Optimist Club Park, a park and playground on Vance Street in the shadow of the Loray Mill. The Noon Optimist Club sponsors the Boys & Girls Clubs of Greater Gaston and donated the land for the park. Courtesy of the Glenn Foundation archives.

A grant for \$25,000 went to the Optimist Club Park Fund at the Community Foundation to construct the park on Vance Street, in the shadow of the Loray Mill advocated by city councilwoman Brenda Craig. The Noon Optimist Club, sponsor of the Boys & Girls Clubs of Greater Gaston, donated the land. It became the first city park in West Gastonia.

The foundation helped Temple Emanuel celebrate its 100th anniversary with a grant for a scholar-in-residence program promoting interfaith understanding; helped fund the parish nurse ministry, a partnership between First Presbyterian Church and First United Methodist Church; and helped underwrite the Stanley Community Choir Singing Christmas Tree, an annual community choral concert in the Town of Stanley, with the grant going to the sponsor, Christ's Evangelical Lutheran Church.

Glenn Family History Research Begins

In October, Barbara made known to the board that she had begun researching the Glenn family history to meet an unmet objective of the 2008–2011 Strategic Plan that had been carried over to the 2012–2014 plan. She had

started in August at the Heritage Room of First Presbyterian Church, followed by a trip to Columbia Theological Seminary, in Decatur, Georgia, to glean information from the early records of Olney and Union Presbyterian churches, the church homes of the Torrence and Glenn families, respectively. She would soon be off to Chapel Hill to study the L. C. Glenn Papers 1752–1927, housed in the Southern Historical Collection at the Wilson Library at the University of North Carolina. Barbara’s passion to tell the story of the Glenn family took her on travels to other venues and led to exploration of many online resources.

An Unexpected Gift

As 2014 began, the foundation received a most unexpected and welcome gift from the Daniel Boone Moser Sr. and Catherine Pearson Moser Charitable Remainder Trust, the largest contribution ever received by the foundation since Carrie’s and Lena’s deaths. Dan found his two terms on the foundation board, from 1993 to 1999, to be meaningful and decided to give back when he made his estate plans. Dan died in 2001 and his wife, Catherine (Cacky), in 2013.

Keeping Money in the Community

In the 2012 grant cycle, the board had granted \$7,500 to Lutheran Family Services, an agency with a long history of serving vulnerable populations, for improvements to its Western Piedmont Foster Care office in Bessemer City. The agency was unable to use the grant as intended. After approving an alternate use that also did not pan out, the board permitted Lutheran Family Services to purchase a storage shed for Faith Farm, its facility for homeless female veterans, and to use the balance for operating costs. Once again, the board opted to keep money in use where it was needed most.

At the first meeting of the calendar year, Julie Shovelin and Emily Craig continued for a second year as chairperson and secretary, respectively, but Tim Efird became vice chairperson and Charles Gallman the treasurer. They served with Rob Collis, John Frye, and Laura Lineberger. Before grant deliberations started, and to address a strategy in the strategic plan to provide opportunities for the community to contribute funds to the

foundation, the board agreed to send a cover letter and a copy of the most recent annual report to Gaston County estate attorneys to acquaint them with the foundation as a potential recipient of charitable gifts.

Grant Distributions: 2014

With an allocation of \$250,000 for the second consecutive year, the board received fifty-nine applications totaling \$786,021 and funded thirty of them. It awarded the Optimist Club Park Fund a second grant for \$20,000 for Phase II construction, an amphitheater and walkway connecting Optimist Club Park to the adjacent West Gastonia Boys & Girls Club. The board funded a second year of Artspace Gastonia; renewed its support for Crisis Assistance Ministry with a grant for emergency assistance; funded Smart Boards for Gaston County public libraries located in Belmont, Bessemer City, Dallas, and Mount Holly; supported the second year of Gaston School of the Arts' Youth Orchestra and Bluegrass Project; and funded Voices for Kids for educational materials for guardian ad litem volunteers and for recreational and educational programs for children in the custody of the Division of Social Services. A grant of \$14,800 helped furnish an eight-unit apartment building on Second Avenue built by Gaston Residential Services, called the Kimbrell Apartments, for persons with disabilities. Duke Kimbrell provided a lead gift. Community Relief Organization of Mount Holly used its grant to provide emergency assistance to those in need.

The board funded a request from the Backpack Weekend Food Program that operated out of Holy Trinity Lutheran Church. This program was the brainchild of Carolyn Niemeyer, a former nurse and community volunteer, who in 2011 was moved to action when she learned that a number of public school children had little or no food to eat on weekends. Empty stomachs hampered learning on Monday mornings. Funds were paid to the church until the agency received tax-exempt status. This program attracted many committed volunteers.

With a discretionary grant to First Presbyterian Church designated for building and grounds, the board honored the life of Steve Owens, who died unexpectedly. Steve was the church's longtime maintenance supervisor, twenty-year scoutmaster of Troop 11 sponsored by the church, and a friend



Loyal volunteers work in the warehouse of the Backpack Weekend Food Program, packing food to feed students in the public school system on weekends. Courtesy of the Glenn Foundation archives.

of the foundation. In March 2015, the Scout Hut at First Presbyterian was renamed the Steve Owens Scout Building.

Two Issues

The board faced two issues when it met in October 2014. The first concerned As One Ministries, a day shelter and resource for homeless individuals, founded by Angela Dreher. The agency had closed for lack of funding, ending a needed community resource, and the Community Foundation offered a \$35,000 challenge grant toward \$70,000 required to reopen. The match was met by the community, including a \$5,000 discretionary grant from the foundation. As One reopened in October 2014. Unfortunately, the program could not be sustained, and the agency closed for good on March 31, 2016, after thirteen years of operation. Phoenix Counseling Service

began a similar service in the same location, using grant funds for a peer support specialist and van transportation for clients.

The second issue concerned an equipment grant for the Children's Advocacy Center, also known as Hope Circle, to aid in investigations and prosecutions of child abuse cases. Children's Advocacy Center was one of the services offered by Family Service Inc. of Gaston County, a stalwart United Way agency founded in 1965 by the Junior Service League of Gastonia. In addition to the Children's Advocacy Council, Family Service offered family counseling, consumer credit counseling, and an assault and victimization intervention and deterrence program (AVID). The foundation had made periodic grants to these programs since 1993.

Family Service was under new management since the retirement of its longtime executive director, Dewey Matherly. The board had funded a 2012 grant to replace a ten-year-old video camera used to record sensitive interviews of victims of child abuse, so that the child need only testify once. After the grant was made but before the equipment was purchased, the agency experienced an unexpected and rapid turnover of board and management. So concerned was the United Way that it suspended the agency's allocation, leading to its closure on July 30, 2014. Other community services were able to absorb all but the Children's Advocacy Center until Prevent Child Abuse Gaston assumed the program. The foundation allowed Prevent Child Abuse Gaston to purchase the equipment and provided an additional grant of \$15,000 to help the center reopen in December 2014. Today, the Child Advocacy Center operates as Hope United Survivors Network, with a new facility called The Lighthouse built along South New Hope Road.

Gaston Hospice requested and received a grant in 2014 to purchase six new beds at the Robin Johnson House before learning that refurbishing the twelve existing beds would cost less. The board allowed Gaston Hospice to use excess grant funds where they were needed the most, which helped the agency purchase a towel warmer and tilt chair.

In late 2014, a founding trustee and early chairman, the Rev. Dr. James G. Stuart, died, and the foundation made a memorial contribution to First Presbyterian Church designated to columbarium improvements. The foundation made a second memorial to the church after the death of W. Alex Hall, longtime trustee, director, and chairman. Both men made considerable contributions to the strength of the foundation.

New officers for 2015 were Tim Efird, chairperson; Emily Craig, vice chairperson; Laura Lineberger, secretary; and Charles Gallman, treasurer, serving with Rob Collis, John Frye, and Julie Shovelin.

Grant Distributions: 2015

With a grant pool of \$285,000, the board deliberated over fifty-three applications and approved twenty-six, including a third payment of \$25,000 to Artspace Gastonia. When the building the Community Foundation chose for rehabilitation did not work out, it identified the parking lot diagonally across Franklin Boulevard from city hall, and in March designated it as the location for a new Artspace building.

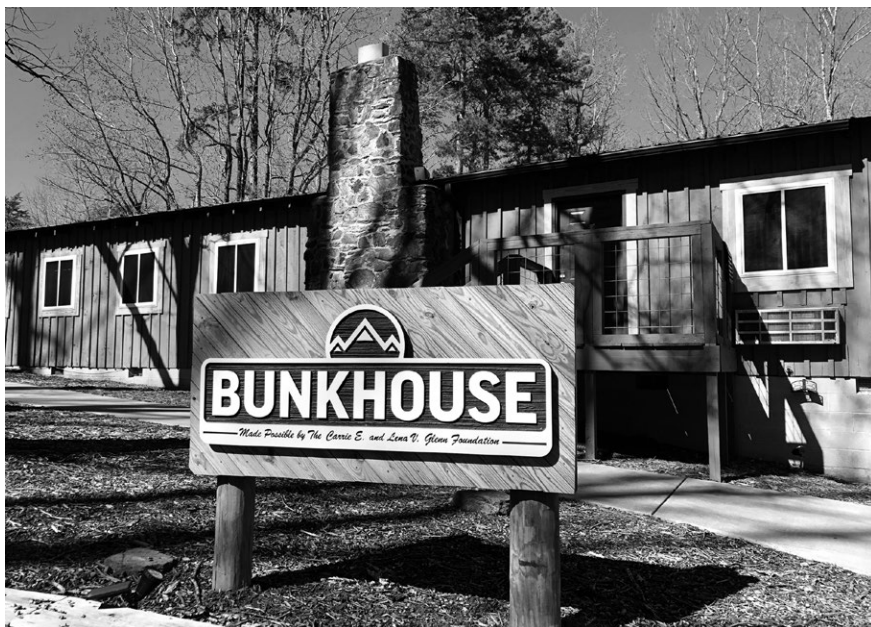
The board made its largest grant of \$35,000 to Gaston College Foundation for two 3-D printers at the Computer Aided Design and Drafting (CADD) lab for the Center of Advanced Manufacturing at Gaston Technology Park, then under construction. Students used the printers on campus until the center opened in September 2017.

The board granted funds to Union Presbyterian Church to clean and repair monuments in the Glenn and Old cemeteries, where time and weather had made many inscriptions illegible. Among those refurbished was the monument of Carrie and Lena's grandparents, Janette Gray Scott Glenn and John Franklin Glenn.

The board granted funds to the American Red Cross for disaster services; to Now Outreach to renovate the Glenn Sisters Lodge at Crowders Camp & Retreat Center, formerly the Girl Scout's Camp Rotary; to the NC Wildlife Federation for Great Outdoors University for children at the Boys & Girls Clubs of Greater Gaston, to get them outdoors and raise their curiosity and appreciation for the natural world; and to Belmont Community Organization for emergency client assistance.

The board had always used multiple meetings to formalize grant decisions. It was at Julie's urging that the board completed its deliberations in one meeting for the first time. Grant deliberations have taken one session since her chairmanship.

With the dedication of the renovated Loray Mill in March 2015, Preservation NC had turned its attention to the Loray Village. The once-vibrant, but now long-neglected, historic working-class neighborhood of about 500



Foundation funds granted to the Girl Scouts of the Pioneer Council in 1992 renovated an activity building at Camp Rotary at Crowders Mountain called the Glenn Sisters Lodge. After Now Outreach purchased the property to create Crowders Ridge Camp & Retreat Center, foundation grants beginning in 2015 began the process of converting the lodge to a bunkhouse for overnight campers. Courtesy of the Glenn Foundation archives.

houses had become an area primarily of poorly maintained rental units. With a grant to Preservation NC, the foundation funded a part-time local project coordinator, Jack Kiser, retired planning director for the City of Gastonia, to manage the acquisition, renovation, and resale of twenty affordable homes in the village. Renovations were made possible by a \$500,000 loan pool from the 1772 Foundation, in Connecticut, to rehabilitate the first houses. Preservation NC had been successful in other areas of the state in transforming similar neighborhoods by restoring homes and selling them to private owners.

In 2015, Gaston College started the Apprentice 321 program, where students began earning journey-worker certificates. It was also the year that First Gaston Foundation transferred its assets to the Community Foundation and established two donor-advised funds, the First Gaston Foundation Fund and the Albert G. Myers Scholarship Fund.

2015–2018 Strategic Plan

That fall, the board completed a new 2015–2018 Strategic Plan over two sessions led by former trustee and director Malinda Lowery of Multiple Choice Inc. The new vision statement read: “To perpetuate the legacy of the Glenn sisters by providing resources where they are most needed to do the most good for the greater Gaston community.” The bold new mission statement read: “To be a catalyst for proactively identifying and strategically initiating tangible, positive change in the Gaston community by funding targeted needs at a root cause level.” Going forward, the board hoped to implement strategic actions designed to impact positive change in the community by targeting programs, services, and partnerships to meet community needs.

By email vote, the board approved a \$2,500 discretionary grant to Girl Scouts Carolinas Peaks to Piedmont (formerly Girl Scouts of the Pioneer Council) for meeting-room furniture for its new office at 156 S. South in downtown Gastonia. The scouts had recently moved from the former Duke Power Company building at the corner of New Hope Road and Old Country Club Road.

As had become customary in most years, the finance committee continued to raise cash early in the year for grants paid after July 1. It also made periodic adjustments to investments, which were reported on the consent docket for approval by the full board. Overhead at the end of June 30, 2015, was .08 percent, maintaining the foundation’s historically low rate.

New Directors in 2016

At the first meeting of the calendar year in February 2016, the board reviewed grant policies in anticipation of the new cycle. Directors agreed to consider capital campaigns on a case-by-case basis and to limit grants for the same program or service for no more than three consecutive years. The board also established a policy for receipt of gifts, which stated that the finance committee would convene within ten days to consider the disposition of any contribution.

Tyler Stuart Bullock, the daughter of founding trustee Jim Stuart, and Charles W. Pearson Jr., local businessman, were elected to succeed Laura Lineberger and Julie Shovelin, whose terms had expired. Laura and Julie

both made important contributions to the fortieth anniversary celebration and as chairpersons of the board.

Tyler was a graduate of the University of North Carolina at Chapel Hill and a longtime teacher's assistant at Sherwood Elementary School. Most of her volunteer activities centered around First Presbyterian Church, where she served as deacon, elder, and Bible moderator, while also involved with the activities of her children, including Girl Scouts, Camp Sunshine, and the PTO and Booster Club at Ashbrook High School. With Laura rotating off the board, Tyler's presence preserved a historic link to the past.

Charlie Pearson, a graduate of Davidson College, was a partner with Pearson Properties and a tireless community volunteer. A veteran of service on the Community Foundation board of directors, Charlie brought energy and insight to his board service at Gaston Hospice, Connect Gaston, Crisis Assistance Ministry, and the Salvation Army Boys and Girls Club. He had a sustained commitment to Gaston School of the Arts, helping to lead the transition from Unity Place to the former Armstrong Presbyterian Church building. Tyler and Charlie were seated at the end of the meeting and joined Tim Efird, chairperson; Emily Craig, vice chairperson; Rob Collis, secretary; Charles Gallman, treasurer; and John Frye.

Before reviewing grant applications at the May meeting, the board held a short business session, where directors finally decided to increase the board size from seven directors to nine. They reasoned that it would even out classes to three directors each, divide committee responsibilities more equitably, and provide new perspectives during grant deliberations. They referred the matter to attorney James Windham Jr. of the firm of Stott Hollowell Palmer & Windham, to draw up changes to the bylaws. Jim had succeeded Jack Drum as the foundation's attorney after Jack's unexpected death in 2010.

In other business, founding trustee Judy Miller died in March, and the board made a memorial contribution to Crisis Assistance Ministry, where Judy had spent countless hours as a volunteer. The board also ratified an email vote allowing the Gaston County Historic Preservation Commission to use remaining 2012 grant funds to construct new roofs over the entrance doors to the chapel and schoolhouse at Heritage Village at the Gaston County Park in Dallas.

Grant Distributions: 2016

Fifty-two agencies had submitted applications totaling over \$995,000 by the March 1, 2016, deadline. The board funded twenty-nine with \$285,000. Since John Frye had entered into a well-deserved sabbatical, six directors deliberated and decided the dispositions of the applications.

As the foundation granted funds for a fourth year of Artspace Gastonia, it also began the first year of a five-year, \$25,000 commitment toward construction of a new building on Robinwood Road at Robinwood Lake for the Gaston County Family YMCA, to replace the Central and South branches. It would become the Warlick Family YMCA, renamed in late 2017 to honor the vision of Andy Warlick, of Parkdale, when the \$21 million building was completed. As with Artspace, the board required the YMCA to reapply annually.

The new magnet elementary school, Hawks Nest STEAM Academy, on Robinwood Road, received funds to purchase equipment and supplies for its STEAM lab. The Gaston County Board of Education recognized the foundation for the gift at a meeting that fall. Grants provided operating funds to Off the Streets Program and With Friends emergency youth shelter; to Classroom Central for school supplies for Gaston County teachers; to Crisis Pregnancy Center to convert a former sanctuary into offices and space for its programs and services after purchasing Brookleigh Baptist Church on Robinson Road; and to the Gaston Symphonic Band for an equipment trailer.

The board also issued a \$15,000 challenge grant to Alexander Youth Network of Charlotte to fund a teaching position at Beacon Hall Day Treatment Program on the Dallas-Cherryville Highway. Beacon Hall served children 5–18 with severe mental health and behavioral problems who were expelled from public school classrooms. The teacher would provide individualized academic instruction to students while they were in treatment so that they would not fall behind in their school work. Alexander Youth Network met the challenge.

The board funded two new programs of special interest. The first was to Preservation NC for the Alfred C. Kessell History Center at the Loray Mill. Rick Kessell had donated funds to Preservation NC to create a



Gaston County teachers choose free school supplies through the Mobile Free Store of Classroom Central. Educators in all county schools, where 50% or more of the student population qualifies for free or reduced lunch, are eligible to shop. Courtesy of the Glenn Foundation archives.

history center in memory of his late father, who worked for Firestone for thirty-seven years. Using technology in creating the history room, Gastonia native Dr. Robert Allen, of the University of North Carolina at Chapel Hill, led the Digital Loray project, digitizing over 1,200 photographs, newspaper articles, oral histories, other documents, and artifacts related to telling the story of the historic landmark. Dr. Julie Davis designed the space inside the Loray where the history of the Loray and Firestone mills could be told. A foundation grant supported a ten-month speaker series called “Loray Talks,” and Myrick Howard, executive director of Preservation NC, kicked off the series. He was eager to bring attention to the revitalization efforts at Loray Village and to promote the Open Village weekend in October 2016 to showcase neighborhood progress.

The second grant was to the Gaston County Family YMCA, which sponsored Resource Connection Gateway, a program of Gaston Faith Network, when the Gateway director, Rev. Dwayne Burks, became the Y's chaplain and director of social responsibility. The Gateway quickly screened people seeking help, particularly chronic users of church and community assistance programs, and matched them with appropriate services, in order to reduce their reliance on churches and crisis assistance agencies, provide them with long-term solutions addressing root causes, and break the cycle of need.

At the conclusion of the meeting, Barbara Voorhees announced to the board her intention to step down on June 30, 2017. Because of the unexpected scope of the Glenn family research, she felt the need to focus solely on completing the family's story.

The board held a called meeting in August and identified Laura Lineberger, former director and chairperson, as Barbara's successor. They instructed Barbara to approach Laura about the possibility of serving as executive director. When Laura showed great interest, the board met with her to review the job description and the terms of an employment agreement. She accepted the offer, understanding that she would begin her service as Barbara's understudy on March 1, 2017. This was the date grant applications were due, and the timing would give Laura a chance to meet many agency directors as they dropped off proposals and to learn the grant process from the ground floor. She would begin her tenure on July 1, 2017.

Before the annual meeting in October 2016, the board learned that Artspace Gastonia had not been awarded tax credits from the North Carolina Housing Finance Agency, which were critical to the success of the project. Because this was the second denial, the Community Foundation placed the project on hold until its board could determine how best to advance.

The board ratified an email vote following a special request from HealthNet Gaston. The agency needed to replace two pieces of equipment needed for eye exams given to low-income residents, and the Community Foundation had issued a challenge grant of \$15,000. The foundation's discretionary gift helped to meet the match.

The foundation had never had a policy on solicitations, and so the rules and procedures committee presented a new policy, which the board approved at the annual meeting. It read: "The foundation makes grants

through an annual application process and at the discretion of the board of directors, but does not participate in solicitations, sponsorships, or fund raising projects.”

Board Expands to Nine Directors

With the convening of the board at its first meeting in February 2017, directors approved bylaw changes to Article II. Board of Directors. Section 2. Number of Directors; and Section 4. Term. The change resulted in increasing the board to nine members in three classes of three directors each. The timing was perfect, since the next two classes up for reelection each had two directors, and so the expansion would be completed within two years. Charles Gallman became chairperson; Emily Craig vice chairperson; Tyler Bullock, secretary; and Rob Collis, treasurer. In the first of two expansions, three new directors joined the board in 2017: Jennifer P. Davis, Gregory S. Sellers, and Lauren Sease Vanacore.

Jennifer Davis was a Gastonia native and proud graduate of Highland High School, who had advocated for its preservation. She graduated from the University of North Carolina in Greensboro, and retired from a career with IBM. Active in the community after her retirement, Jennifer served as a member and chairman of the Gaston County board of education. She was a certified diversity consultant, author, and motivational speaker through her company, Jennifer P. Davis & Associates, and a member of Epworth United Methodist Church.

Greg Sellers, CPA, was the chief financial officer of Spectrum Consultants Inc., which would become Tandem Senior Living Advisors in 2021. A Bessemer City native, Greg graduated from the University of North Carolina at Chapel Hill with degrees in business administration and accounting. He was an elder and active at First Presbyterian Church. Among community activities, he volunteered with the Gaston County YMCA and Cancer Services of Gaston County.

The Rev. Lauren Sease Vanacore became associate pastor at First Presbyterian Church in 2011 and succeeded John Frye as church representative. A Virginia native, Lauren was a graduate of Greensboro College and Princeton Theological Seminary. She had served on the board of Crisis Assistance Ministry, was a past participant of the Gaston Interfaith Trialogue,

chaired the examinations committee of the Presbytery of Western North Carolina, and would go on to serve as moderator of Presbytery.

Grant Distributions: 2017

The board made twenty-five grants totaling \$282,000 when it met in May. The largest grant, of \$30,000, went to Webb Street School to install an aquaponics growing system in a renovated greenhouse that would cultivate fish and plants together. This highly successful program quickly became a learning lab and teaching tool for special-needs students who learn best through repetition and hands-on activities.

A grant of \$12,000 went to Gaston Together: Communities of Excellence, to help underwrite the second year of the Civic Engagement



Students and staff work together harvesting lettuce in the aquaponics garden on the campus of Webb Street School. The garden is a learning lab and teaching tool for special-needs students. Courtesy of the Glenn Foundation archives.

Leadership program for Gaston County young adults ages 25–40. The goal of the program was to create a diverse, connected group of future leaders with skills in civic engagement, as a way to attract and retain them and nurture a new generation of leadership for the county.

The board continued its support to Preservation NC with funds to staff the Loray Village project and to Alexander Youth Network for the Beacon Hall teaching position, and provided partial funding to fence in property at a safe house for female victims of sex trafficking, ages 12–18, for On Eagles Wings Ministries. Another grant enabled the Gaston County Division of Social Services to purchase supplies and equipment for its resource closet needed to keep children safe in their own homes, or to help foster parents through their first days of providing care for children who were removed from their homes. Two other grants funded the Catawba Lands Conservancy for critical improvements along the South Fork Trail at Pharr Yarns Preserves in McAdenville, and for the SPARC undergraduate research program at Gaston College.

Farewell Reception

On June 8, 2017, the board hosted a farewell reception for Barbara honoring her seventeen years of service to the foundation. Held in the fellowship hall of First Presbyterian Church, over 160 family, friends, and colleagues were in attendance. During her tenure, Barbara assisted the trustees and directors in distributing over \$5 million in grants, raising total foundation giving to \$7.96 million. After four months of working side by side with Barbara, Laura was ready to assume her new responsibilities. Her experience as a former director and chairperson would serve her well as executive director.

CHAPTER 15

Fifty Years of Doing Good

2017–2022

On July 1, 2017, her official start date, Laura jumped headfirst into her new responsibilities, mailing checks to grant recipients, preparing the books for the annual financial review and information for the annual report, planning the annual meeting in October, and in November attending the Southeastern Council of Foundations Conference in Orlando with Tyler Bullock and Lauren Vanacore. It was a seamless transition, but a busy time.

That fall, at the annual meeting, John Granzow reported assets of \$6.92 million. The board approved the 2017–2018 budget and minor changes to the grant application form (mostly dates), and tweaked the wording of the policy on demographic location. Barbara, still glowing from the wonderful retirement reception, settled in at home and began writing the story of the Glenns, setting it amid the growth and development of Gaston County. Writing, editing, and publishing would take several more years.

When the board gathered on February 15, 2018, for the first meeting of the calendar year, assets had risen to \$7.2 million. Charlie Pearson and Jennifer Davis began mapping out a new strategic plan for 2019–2022, with the goal of making it simple, practical, and achievable, given the resources of the foundation. The plan included developing a framework for foundations and other interested parties to explore future joint initiatives. A meeting with Community Foundation president Ernest Sumner confirmed that his organization was interested in continuing a philanthropic partnership once a project was identified.



Laura G. Lineberger became the foundation's second executive director on July 1, 2017. Courtesy of Laura G. Lineberger.

As the meeting concluded, 2017 officers continued on for 2018: Charles Gallman, chairperson; Charlie Pearson, vice chairperson; Tyler Bullock, secretary; and Greg Sellers, treasurer. Rob Collis and Emily Craig rotated off the board and received Tiffany bowls. Each served in many capacities and made lasting contributions to the work of the foundation during their six-year tenures. Jennifer Davis and Lauren Vanacore continued and were joined by new directors Richard Blackburn, Rev. David Christy, and Ann Davis, three directors replacing two, as the board concluded its expansion to nine directors. Dub Dickson would have been pleased. Charles and Laura provided orientation.

Richard Blackburn had been employed by CaroMont Health for thirty-one years, and was now vice president for facilities and support services. A graduate of Warren Wilson College, he received a master's degree in business and a master's degree in health care administration from Pfeiffer University. He volunteered with Holy Angels, Piedmont Council Boy Scouts, and the Gaston County Family YMCA, and was president of the board of directors of the Backpack Weekend Food Program.

David Christy was senior minister at First United Methodist Church in Gastonia, and was involved in the community through Boys & Girls Clubs of Greater Gaston, as chairman of Gaston Together's Gaston Clergy

and Citizens Coalition (GC3), and on the board of Ordained Ministry for the Western North Carolina Conference of the United Methodist Church. David was a graduate of Pfeiffer University and held a master's of divinity degree from Duke Divinity School. He and Lauren Vanacore would soon compete against one other in the Dancing for Future Stars fundraiser for the Boys & Girls Clubs of Greater Gaston.

Ann Davis was retired from Gaston Hospice after twenty-four years as development coordinator. She received her undergraduate degree in health care administration from Pfeiffer University. A member of Gastonia East Rotary Club, she was an active volunteer with the Backpack Weekend Food Program, a member of the board of the Gaston County Education Foundation, of the grants committee of the CaroMont Health Foundation and of the parish response ministry at First United Methodist Church, and was a volunteer tutor at Pleasant Ridge Elementary School. The three new directors brought much experience and community knowledge to their board service.

As an ongoing part of the strategic plan to increase visibility of the foundation, Laura expressed a desire to visit the twenty-five agencies that had been awarded grants in 2017, and the board gave her the go-ahead. After her visits, she reported to the board letting them know that agencies used grant funds responsibly. Directors accompanied Laura on the visits as their schedules permitted.

After making four \$25,000 payments to the Community Foundation, Artspace Gastonia did not materialize. As a result of the failure, the Community Foundation reached a settlement with Artspace, and the Glenn Foundation received \$61,184 in repayment. Because return of the money would adversely affect the minimum distribution in the year the funds were received, the board voted to place the money in a donor-advised fund with the Community Foundation, with no deadline for the funds to be expended.

Grant Distributions: 2018

By the time the grant meeting took place on May 17, Laura had visited all recipients of 2017 grants. Now, a new grant cycle had begun. The foundation received fifty-three applications and funded twenty-seven agencies with an allocation of \$285,000.

Carolina Cross Connection, a summer church youth work camp, received funds to assist in providing fifteen Gaston County families with ramps, porches, or stairs to make their homes safe and accessible. Dream Center Academy, a multiyear summer and after-school program in its first year, received a grant of \$25,000. Beginning with rising sixth-graders and adding a class a year until high school graduation, the academy's goal was to help selected students escape generational poverty by preparing them for college or careers so that they might reach their full potential. Grant funds went to the Gaston College Foundation to fund the AVISO Retention Program designed to increase students' success and on-time graduation.

A grant to Hunter Huss High School funded an upgrade to audio equipment in the auditorium, which the school used daily for academic courses and formal programs; to the Arc of Gaston County for Project Lifesaver wristband kits for the safety of persons with intellectual developmental disabilities; to the Partnership for Children of Lincoln & Gaston Counties for the Reach Out and Read program that provided age-appropriate books at each well-child visit for children 6 months to age 5 to promote early literacy and demonstrate the importance of parents reading to their children; and to Bit of Hope Ranch for partial funding to renovate an existing barn to create a wellness clinic for physical therapy, using team members from Shining Hope Farms in Mount Holly.

By the October annual meeting, the Carrie E. and Lena V. Glenn Foundation Fund had been established with the Community Foundation. The board approved changes to the investment policy statement proposed by the finance committee and voted to conduct the annual review of the executive director's performance at the May business meeting, based on performance in the current fiscal year.

2019–2022 Strategic Plan

Jennifer and Charlie had completed the 2019–2022 Strategic Plan, which the board approved in October. The new plan guided efforts to maintain the integrity of the foundation and its niche in the community. The vision statement became the mission statement: “To perpetuate the legacy of the Glenn sisters by providing resources where they are most needed to do the

most good for the greater Gaston community.” The board approved values statements in lieu of the vision statement. Its tenets were to:

- Maintain integrity, transparency, and practice good stewardship in all our operations and deliberations.
- Promote self-reliance and independence of grantees in our grantmaking.
- Make grants free of self-dealing or other conflicts of interest.
- Partner with other community organizations, when appropriate, for the good of the community.
- Promote fairness and equity, without discrimination, in all our operations.
- Strive to maintain a diverse board of directors whose pulse is on the community.

The plan established four goals:

1. Assure a strong organizational base for the Foundation, maintain-
ing strong leadership throughout.
2. Be good stewards of Foundation funds through prudent investment
and sound management.
3. Support positive change through effective grantmaking and
philanthropic partnerships and initiatives.
4. Increase visibility of the Foundation to the community.

Electronic Application Form

For several years, the CaroMont Health Foundation and the Community Foundation had been using an electronic grant application process called Smarter Select. Director Ann Davis was familiar with the process, having served as a member of CaroMont Health Foundation’s grant-review committee. The board asked Laura to investigate the possibility of adapting it for use by the foundation, resulting in several exploratory meetings as she learned more about the program.

At the February 2019 meeting, after Jim Ratchford and Karen Walker presented the annual financial review, the board presented Jim with a Tiffany bowl in appreciation for his faithful service to the foundation since

1987. After a career with Cherry Bekaert, Jim was retiring effective April 30, 2019. Tyler Bullock and Charlie Pearson continued their service with new three-year terms, and David Rogers, a retired CPA with McCannon Rogers Driscoll & Associates, succeeded Charles Gallman as he rotated off the board.

Charles had served as treasurer for three years and chairperson for two years, served on every committee of the board, and was instrumental in the seamless transition of executive directors, overseeing Barbara's retirement reception and progress on the Glenn book, and helping negotiate the settlement of Artspace Gastonia. New officers for 2019 were chairperson Charlie Pearson and vice chairperson Jennifer Davis. Tyler Bullock and Greg Sellers continued in their respective offices as secretary and treasurer. Charles, with Tyler and Laura, had attended the Southeastern Council of Foundations Conference in Louisville, Kentucky, the previous November.

David Rogers was a graduate of the University of North Carolina in Charlotte with a bachelor's degree in accounting. He was an active board member of the Heart Society of Gaston County, Gaston County Family YMCA, Gaston Breakfast Rotary Club, and the North Carolina Association of CPAs, and had served as an elder and on many committees of First Presbyterian Church in Gastonia.

John Frye retired in January, and Lauren continued serving as the church representative. Laura and Charlie participated in a community visioning process for the county's Gaston Vision 2030. The board took part in a communications assessment led by Rev. Dwayne Burks.

Grant Distributions: 2019

As May rolled around, and with \$300,000 to distribute, plus \$62,051 reported in the donor-advised fund at the Community Foundation, the board funded twenty-six applications. Webb Street School received a grant to upgrade the heating and cooling water system for its aquaponics garden, and exhaust fans to cool the greenhouse in the summer months. The greenhouse was a great success, and Webb Street School Mixed Green Salad became a staple on the menu at Webb Custom Kitchen on South Street.

The board granted funds to the Rotary Foundation of Gaston County for construction of long-needed permanent restrooms and water fountains at



Children swing on the big swing, or Swing of Faith, at Crowders Ridge Camp & Retreat Center. A 2021 grant to Least of These Carolinas enabled these and other foster youth to experience an overnight camp. Courtesy of the Glenn Foundation archives.

the Rotary Centennial Pavilion. The Rotary Foundation was the charitable arm of the Rotary Club of Gastonia, and the project celebrated the club's centennial in January 2020. The board granted \$5,000 to NC MedAssist, which leveraged approximately \$100,000 worth of free over-the-counter medication to Gaston County low-income individuals and families in a one-day giveaway.

Least of These Carolinas received two grants, one to purchase new twin beds, bunk beds, and cribs for children living at home or in foster or kinship care without a bed; and one to give an overnight camping experience to foster children at Crowders Ridge Camp & Retreat Center. The board funded the Bee the Change program of Keep Gastonia Beautiful to educate students and the community on the importance of bees and their effect on the environment. The City of Gastonia had officially become the 74th Bee City USA affiliate in the previous September, and images of bees already adorned the façade of the county administration building on Main Street, among other locations.

The board continued financial support for the Dream Center Academy and the Civic Engagement Leadership initiative of Gaston Together, and funded a grant to the City of Belmont for software, laptops, and material costs for a new program called TechWorks of Gaston County/Gaston Innovative Group, an entrepreneurial hub for tech businesses that also offered a variety of learning opportunities for children and adults. Governor Roy



Foundation funds in 2020 provided needed improvements to the food pantry at Crisis Assistance Ministry of Christians & Jews of Greater Gastonia. Improvements included shelving and a walk-in refrigerator. Courtesy of the Glenn Foundation archives.

Cooper visited the innovative program in October 2019. Crisis Assistance Ministry received \$10,000 to make improvements to the shelving in its food pantry and to purchase a walk-in refrigerator for safe storage of perishable foods.

During 2019, changes in the county continued to occur. Dorothy Guthrie, retired media specialist and member of the Gaston County board of education, with her husband, Bobby, also an educator, had founded a new nonprofit in February, the African American Museum of History & Culture, located inside the Loray Mill. In July, Phoenix Counseling Center, the agency that operated the day center for homeless individuals, closed the program due to lack of funding. In the fall, Wayne Shovelin and his wife, former board chair Julie Shovelin, received the Community Foundation's Sims Award for their community service and philanthropy. In December,

Cathy Howell retired after twenty-nine years as director of Crisis Assistance Ministry of Christians & Jews of Greater Gastonia.

Glenn Family History

In August 2019, Barbara completed the manuscript of the Glenn family history and submitted it to the University of North Carolina Press. With the rejection came the explanation that the work was more descriptive than analytical and therefore not the type of book they published. Suggesting that an editor was needed, the board approved hiring Julie Campbell of Richmond, Virginia, to edit the manuscript. Julie, a published author, held bachelor's and master's degrees in history, was former editor of *Virginia Cavalcade* magazine, and retired as associate director of communications and public affairs at Washington and Lee University. She kept the focus on the Glenn family as she streamlined the manuscript, relegating interesting but perhaps distracting details to endnotes and sidebars.

Smarter Select

At its October meeting, the board approved purchasing the Smarter Select online grant application program and a laptop computer for Laura. Thanks to exceptional collaboration from the Gaston Community Foundation, particularly president Ernest Sumner and program director Erin Wiggins, Laura was able to tailor the template to the Glenn Foundation's application form and learn how the program functioned. The rules and procedures committee completed a review of the Policy and Procedures Manual, revising some grant policies and adding a new policy allowing for online bill payments, with payments subject to review by a volunteer.

Upon the death of Walter W. "Dub" Dickson, a wonderful community member, public servant, and the longest-serving member of the board, the foundation honored his life with a memorial contribution to First Presbyterians Church. Although the family history was nearing completion, Barbara had received several large envelopes of additional material from the Glenn family to read, digest, and incorporate into the story. At her editor's suggestion, she also added African American history to give a more complete picture of the growth and development of Gaston County. This required

additional research. Charlie, as chairperson, agreed to write a foreword on behalf of the board. Officers remained the same in 2020 as in 2019, and directors Jennifer Davis, Greg Sellers, and Lauren Vanacore were reelected to second three-year terms.

Global Pandemic

The 2020 grant cycle would be the first time that agencies applied to the foundation using the Smarter Select electronic application process, with the customary March 1 deadline. Applicants had no idea as they prepared their requests that the world would soon turn upside down. A global pandemic caused by a virus of Chinese origin, labeled COVID-19, reached Gaston County in March. Schools closed, churches closed, the public library closed, movie theaters closed, gyms closed, air travel stopped, and businesses closed—some permanently, putting people out of work. CaroMont Health was inundated with COVID patients. Mask mandates, social distancing, quarantines, and fear became the new norm as news of hospitalizations and deaths multiplied. Work from home and Zoom meetings became commonplace. Gaston's helping agencies were deluged with requests. Variants of the disease kept lockdowns continuing into 2021.

As schools moved to remote learning, the David Belk Cannon Foundation made a generous grant to Gaston County schools to assure that there would be computers for every child without one, but then wireless access had to be secured and paid for. Of all the years for the foundation to implement a paperless grant application process, 2020 was the year.

In response to the pandemic, the United Way of Gaston County established the Virus Relief Fund, with the Gaston Community Foundation acting as fiscal agent. The community raised over \$450,000 to address needs. Local nonprofits were encouraged to apply for funding for programs and services that directly helped people affected by the economic fallout related to the pandemic. In April, the board made a special contribution of \$25,000 to the Virus Relief Fund paid from the Carrie E. and Lena V. Glenn Foundation Fund at the Gaston Community Foundation. The board used another \$7,645 from the fund to provide the Salvation Army with a security system, completing a grant of \$16,850 to help address challenges they faced

in serving the homeless population. Finally, it made a \$10,000 grant from the fund to Crisis Assistance Ministry to help meet the needs of individuals and families in greater Gastonia with food, deposits, rent, and utility payments.

In April, the Granzow Consulting Group merged with the wealth-consulting practice of Ed Dalrymple to form The Armillary Group of Wells Fargo Advisors, with Granzow and Dalrymple the managing directors. The finance committee had thought it time to assess the effectiveness of the investment performance and manager fees, but after evaluation and discussion decided no change was needed, and the board concurred. Officers remained the same, and the board renewed the three-year terms of Richard Blackburn, David Christy and Ann Davis, who were eligible for reelection.

Grant Distributions: 2020

Due to the pandemic, Laura's visits to grantees became a combination of in-person, Zoom, or conference calls. Meetings of the foundation, however, remained in-person but socially distanced. In May, grant deliberations took place in the fellowship hall of First Presbyterian Church. Laura's successful mastery of Smarter Select made for a smooth grant process for both the agencies and the board; agencies no longer had to provide nine copies of the application form and related materials, and the directors did not have to handle so much paper. John Granzow urged a more conservative allocation as a result of the economic downturn caused by the pandemic, and so the grant pool was \$230,000. The board received sixty-four requests totaling \$1,124,085 and granted twenty-six of them.

Mindful of the economic effects of the pandemic on the community, the board sought to fund programs that provided basic needs: BackPack Weekend Food Program, Belmont Community Organization for backpacks with school supplies and shoe vouchers; Cherryville Area Ministries to install a new dropped ceiling and lighting greatly needed at its thrift store, a source of funding for the agency; Catherine's House, to assist homeless women and children; Family Promise for intense case management services for homeless families; the Outreach Food Ministry of Christ Community Baptist Church; and Gaston County Department of Health & Human Services

for continued support of the children and family services resource closet. Funds provided patient assistance including medication, equipment, and supplies for the Heart Society and Cancer Services.

Grants funded the new African American Museum of History & Culture at the Loray Mill; supported a new class of the Civic Engagement Leadership program; and paid instructors teaching at TechWorks of Gaston County technology academy. Sixth-graders from the first class at the Dream Center were entering high school, and a grant supported the expansion of the program to ninth-graders. The foundation completed its five-year commitment to the Warlick Family YMCA. When grant deliberations concluded, the board granted about one-half of its allocations to help agencies with basic human needs of food, shelter, medication, and housing.

To the Stars

In June, with the grant process behind them and editing now complete, directors turned their attention to the publication of the Glenn family history, entitled *To the Stars: The Glenns of Gaston County, North Carolina. A Story of Determination, Achievement, and Charity*. With board approval, Laura and Barbara sent the manuscript off to BW&A Books in Oxford, North Carolina, for design and publication. Charlie appointed a committee of Tyler Bullock, Ann Davis, and Lauren Vanacore to shepherd a celebration and book reception scheduled for April 22, 2021, at the Loray Mill, pandemic permitting. The board also approved a special appropriation of \$5,000 to the Gaston Literacy Council to honor Barbara at the event.

In July, director David Christy became superintendent of the Catawba Valley United Methodist District. Fortunately, his new office was on Main Street, Gastonia, and so he remained on the board. Crisis Assistance Ministry's newsletter recognized the foundation for its special grant for crisis assistance as a result of COVID. The Dream Center Academy also recognized the foundation in an article about the academy in *Gaston Alive* magazine.

In August, the Gaston Regional Chamber and the Greater Gaston Development Corporation voted to merge effective January 1, 2021. The new organization, still affiliated with the US Chamber of Commerce, would



A 2020 foundation grant to the African American Museum of History & Culture at the Loray Mill helped fund this magnificent quilt of over sixty squares, with dimensions of 65 by 80 inches. It was sewn by volunteers from the African American Quilt Guild of Gaston County, and depicts important African American political and business leaders, entrepreneurs, and newspaper items in Gaston County's history. Courtesy of the African American Museum of History and Culture at the Loray Mill.

be called the Gaston Business Association. With construction completed, the Rotary Club of Gastonia dedicated the Rotary Restrooms. The ceremony took place outdoors in December 2020 with masked attendees. The restrooms were turned over to the City of Gastonia to maintain and set the hours of operation, but closed temporarily due to the pandemic.

On December 31, 2020, the portfolio was valued at \$7.547 million, and the donor-advised fund at Gaston Community Foundation now totaled \$21,029. Just as the finance committee had discussed reviewing the fund manager, it decided to request proposals from three local accounting firms, and accepted the low bid from McCannon Rogers Driscoll & Associates to begin performing the financial review. Officers for 2020 remained in place, and Jennifer Davis, Greg Sellers, and Lauren Vanacore began their second three-year terms.

The FUSE

In downtown Gastonia, exciting things were happening with the creation of the FUSE, the Franklin Urban Sports and Entertainment district on West Franklin Boulevard, with construction of a new multipurpose baseball stadium owned by the city. Gastonia had always been a baseball town, but with the loss of the Gastonia Grizzlies, the college summer team that had played at Sims Park and had brought such entertainment to fans, the city decided instead to target professional baseball. The hope was that the venue would bring new life to West Gastonia. Miraculously, construction was not hindered by the pandemic.

The stadium was designed for multipurpose use, with a field able to host concerts as well as football, soccer, or lacrosse. It also had a large indoor event space. The most exciting aspect of the new venture was securing a professional baseball team affiliated with the Atlantic League, with Brandon Bellamy, of Velocity Companies of Baltimore, leading the team ownership group. The city was abuzz when the team name was revealed: Gastonia Honey Hunters, piggybacking on Gastonia's identity as a Bee City and on Hunter Ransom, a formerly enslaved man who became a Mount Holly landowner and entrepreneur in the late nineteenth and early twentieth centuries. The ballpark was within walking distance of downtown, the Loray Mill apartments, and the homes in Loray Village. In May, the FUSE

stadium was named CaroMont Health Park, a naming gift by the county's hospital system.

In the center of Main Street, Center City Crossing apartments began preparations for a six-story apartment building where Center City Park was located. The city made aesthetic improvements to the west end of Main Street, the gateway to the ballpark from downtown, and developers bought the 1897 Trenton Mill adjacent to the ballpark, Gastonia's second textile mill, and began creating Trenton Mill Lofts, one- and two-bedroom and loft apartments. The former Coca Cola plant was ripe for repurposing, and plans were underway for a nearby brewery.

Along New Hope Road in east Gastonia, the Gaston Community Foundation made plans for a new 20,000-square-foot Class A office building, where the Girl Scout office had been located. Once again, the board declined to become a donor-advised fund at the Community Foundation, but did seriously consider locating in the new building before deciding to remain at the Union Road office.

BW&A Books shipped the completed design of *To the Stars* to Sheridan Books, of Brainerd, Minnesota, for printing, and in January 2021, 380 copies arrived at the office after delays caused by the pandemic. One book was mailed to the Library of Congress for a copyright and control number. While the books were finally in-house, the board voted to postpone the April reception, hoping COVID would abate by waiting a bit longer. It set the new date of September 23 at the Lucy Rawlings Penegar Event Hall at the Loray Mill.

Grant Distributions: 2021

With a grant pool of \$282,300, the board began reviewing applications and approved nineteen from thirty-five requests. Crisis Assistance Ministry received \$20,000, which enabled the agency to increase individual financial limits to make a more meaningful difference in outcomes for their clients. Other helping agencies also received funds: Hope 4 Gaston for its clothing Closet of Hope, and the Salvation Army for new air conditioners at the Center of Hope homeless shelter. The Boys & Girls Clubs of Greater Gaston used its grant of \$25,000 for the after-school enrichment program focusing on overcoming academic learning losses and emotional stress experienced



Grant funds to Keep Gastonia Beautiful for a public art and education project inspired this bee-inspired mosaic column made from recycled smalti glass. The mosaic column stands tall and proud outside of CaroMont Health Park stadium, home of the Gastonia Honey Hunters, reminding citizens and visitors that Gastonia is a “Great Place to Bee.” Courtesy of Keep Gastonia Beautiful.

by their children and youths due to the pandemic. The board also granted a one-time gift of \$75,000 to Habitat for Humanity of Gaston County for infrastructure construction costs for its innovative Dixon Village neighborhood project of private and Habitat homes in north Belmont.

The board granted funds to Keep Gastonia Beautiful to create interactive art installations at CaroMont Health Park. A Bee sculpture was in-



Riverkeeper Brandon Jones collects a water sample as part of Catawba Riverkeeper Foundation's water-quality monitoring program, funded in part by a 2021 foundation grant. Courtesy of Catawba Riverkeeper Foundation.

stalled outside the ballpark in summer 2022. Catawba Riverkeeper Foundation received funds to improve the water quality of the South Fork River in Gaston County. The Riverkeeper Foundation was moving from Charlotte and renovating permanent office space in an older building in McAdenville. As he had in previous years, treasurer Greg Sellers kept the tally of grant totals in real time, which made deliberations very efficient.

Grantmaking Policies

Over the previous three years, the board continued its process to review and tweak grantmaking policies. It reworded the policy on geographic location to state that the foundation would fund projects of out-of-county agencies when they provided direct services in Gaston County. It limited agencies to one application per grant cycle and limited multiyear grants to a maximum of five years. Finally, the board adopted a policy not to grant funds to private schools that were full-time academic institutions.

Book Reception

The book reception, held on September 23, was a great success, albeit with masked attendees, with delicious food, a large attendance including Glenn family members, and photographer Rick Haithcox present. The board surprised Barbara with the grant to Gaston Literacy Council followed by The Order of the Long Leaf Pine, North Carolina's highest civilian honor, to honor her lifetime of volunteer and professional involvement. Books were given to attendees as they departed the venue, a gift from the foundation to the community. Laura organized the distribution of books to those unable to attend the reception, as well as to additional Glenn family members and other interested individuals in the community.

Laura had submitted a nomination form for *To the Stars* to the North Carolina Genealogical Society in July, and a week after the reception, received notification that the book was recognized with the Award of Excellence for Publication of a Book of Family History. Because of concerns over COVID, the awards presentation was a virtual event held in Raleigh.

Laura and several directors attended the Southeastern Council of Foundations conference in November in Asheville, since the location was close. At this meeting came the announcement of a new name, Philanthropy Southeast. The board noted the death of George C. Winecoff III, who as a young trust officer providentially suggested that the Glenn sisters leave their savings to charity. David Rogers was elected to his second three-year term in the Class of 2025, and Dwayne Burks and Vincent Wong were elected to the board, succeeding Tyler Bullock and Charlie Pearson. Officers for the fiftieth anniversary year were Jennifer Davis, chairperson; David Rogers, vice chairperson; and Ann Davis, secretary. Greg Sellers remained the treasurer.

Charlie Pearson had done a remarkable job in his three years as board chairperson. He steered the foundation through COVID and the adoption of Smarter Select, the creation of the foundation fund at the Gaston Community Foundation, and a book reception. Said his successor, Jennifer Davis, "Charlie's patience, direction, vision, and passion have been a guiding light during the writing and publication of the Glenn family and foundation histories."

Dwayne Burks, an ordained minister, was the director of the Gateway Gaston, recipient of several foundation grants. Before the advent of COVID, he had hosted two Legacy of Freedom trips, visiting significant civil rights sites in Atlanta, Georgia, and Montgomery and Selma, Alabama, for local clergy and citizens from multiple denominations. He participated in outreach ministry by serving meals to those in need, and taught cultural-competency education sessions for the Charlotte-Mecklenburg Police Department. In January 2022, Dwayne was honored by the Gaston Clergy and Citizens Coalition as a recipient of the Martin Luther King Unity Award, sponsored by Gaston Together.

Vincent Wong had over fourteen years of service in state and local government, and served as executive project manager for Gaston County administration. In 2019, he was selected as Gaston County's Department of Health & Human Services Hero Award and named to the Inaugural Gaston County Top 10 Under 40 list. Coincidentally, Vincent was the fiftieth person to serve on the board in the foundation's fiftieth anniversary year.

The work of the foundation would continue with the newly constituted board.

Epilogue

March 29, 2022, marked fifty years from the first board meeting of the Carrie E. and Lena V. Glenn Foundation called by trust officer Bob Rosebro. Over those years, the legal structure of the foundation changed from an indentured trust to a North Carolina nonprofit corporation. The board expanded from five to seven trustees and directors and then to nine directors. (See Appendix A.) The office moved from a room at First Presbyterian Church to Caroline Garrison's spare bedroom and then to a freestanding office at 1552 Union Road, Suite D, Union Commons, Gastonia. The corpus, which was managed by the trust department of the Citizens National Bank, then Independence National Bank, and then BB&T (Truist), changed to an independently managed portfolio with a manager of several fund managers. There was no strategic plan for almost thirty years, but since then, such plans have provided steady guidance to advance the mission of the foundation. Throughout these changes, the foundation has remained private, as it was when it was established. This history is our fiftieth anniversary gift to the community.

In its first fifty years, the foundation provided \$9.062 million in charitable gifts to the community, three times the sisters' original contribution. The corpus is now \$7.2 million, and 256 organizations have received 995 separate grants for their programs and services. The vast majority of these gifts have remained within Gaston County to meet needs of individuals and families. (See Appendix B.)

Through the years, the foundation has funded operating costs and provided seed money for new agencies when it filled identified gaps in services. Grant categories—of arts and culture, children and youth, civic, education, environment, health and science, human services, and religion—have resulted in projects touching hundreds of citizens of all ages and from all walks of life.

In 1999, the foundation invested \$100,000 when it initiated the Pride in Gaston media campaign to enhance the image of our county, first at home and then regionally. In 2002, to celebrate thirty years of grantmaking, a gift of \$100,000 to United Way of Gaston County helped this umbrella agency compensate for the loss of workplace campaigns as the county's textile industry was diminishing. In 2005, the foundation boosted long-term economic growth in the region when it gifted \$250,000 to the nearby US National Whitewater Center, joining with banks and regional lenders to ensure the success of this project. When the 2005–2007 Strategic Plan called for dialogue with other foundations to address major needs, the foundation initiated talks with local foundations and philanthropists, leading to the birth of Gaston Career Climb to build a nationally certified workforce in the county. The three-year philanthropic initiative in 2008 grew to five years, and the foundation's contribution grew to \$202,040. In 2012, the foundation's fortieth anniversary gift of \$65,000 to Gaston County schools provided over 8,000 new books to middle school libraries countywide.

Combined with other funding sources, grant funds have helped the community in tangible ways: building a screened porch at Adult Day Center (The Center) in Gastonia, a bridge on the Avon-Catawba Greenway Trail, a unique community playground at Martha Rivers Park, the Rotary Centennial Pavilion to spur development in downtown Gastonia, the House of Mercy to provide hospice care for AIDS patients, a dog park, a dental clinic, walking trails, and a domestic violence refuge. A grant honoring the late James B. "Jick" Garland, the ten-year Gastonia mayor and the Glenn sisters' attorney, funded a permanent display of his memorabilia at the Garland Municipal Business Center. Grants have also funded "This Little Light of Mine," the mosaic tile mural by Gastonia native John Biggers on the façade of the Schiele Museum, and contributed to the publication of

The Life and Art of Ralph Ray, Jr. to bring awareness to a talented Gastonia native son and Glenn relative by marriage.

Foundation funds have alleviated the plight of families in economic distress and those who are homeless or victims of domestic violence; provided residential housing for women and their children; championed children and youth with grants for playgrounds, cultural enrichment, mentoring, leadership development, after-school and summer programs, and the inaugural year of the Commissioners School of Excellence. The foundation has funded adult day centers and Meals on Wheels for seniors; supported summer camps, sheltered workshops, and group homes for those with disabilities; and promoted civic pride with financial support for three All-America City teams. Grant funds have provided agency staff training and funded staff positions. And always, when a project could not be completed as proposed, the foundation worked with grantees to find alternative solutions.

The foundation's 256 hardworking partners, through their passion and compassion, have rendered positive change and community betterment for their fellow citizens. Projects, programs, and services could not have been accomplished without the dedicated leadership of agency boards, staff, and volunteers. Grantmaking is a partnership, and the foundation is fortunate to have such devoted community collaborators. We salute them!

The foundation holds a unique position in the Gaston philanthropic community. It is small enough to support the needs of small organizations whose programs might otherwise fall through the cracks, but large enough to be a leader among other foundations. Its impact has always been larger than its assets, however, because trustees and directors have brought varied perspectives from their professional lives and extensive community service to their collective decision-making, along with hearts for the needs of people. Whether giving through the annual grant process, collaborative projects, or discretionary grants, the board has leveraged resources where possible in order to increase impact, promote civic pride, and contribute to the long-term betterment of the county and region.

The board has selected trustees and directors quite deliberately for their wisdom, community knowledge, and volunteer experiences. They have been thoughtful, compassionate, innovative, bold, and courageous. Most especially, they have been faithful stewards in granting funds where

needed most, to do the most good, guidance the founders provided when leaving their entire life savings to the foundation. When confronted with hard decisions, directors will remember this phrase and will ask, “What would Carrie and Lena do?”

The Glenn sisters, Carrie and Lena, could not have imagined that they, of their accomplished siblings, would be the ones remembered in Gaston County for their sacrifices, their discipline to save for old age, and their charitable spirit. Gaston County is so much better thanks to their selfless generosity.

May God continue to bless the Glenn Foundation for another fifty years.

APPENDIX A

The Carrie E. and Lena V. Glenn Foundation Inc. Fifty Years of Trustees and Directors

Trustees

1. **Hugh F. Bryant**, *Jefferson-Pilot Insurance*, 1972–1986, 1986–1989, 1989–1992
2. *Dr. Charles A. Glenn, *surgeon*, 1972–1975
3. *Judith M. Miller (Mrs. George R.), *community volunteer*, 1972–1986, 1986–1989, 1989–1992
4. *Robert N. Rosebro, *Citizens National Bank of Gastonia* (trust officer), 1972–1975
5. ***Rev. Dr. James G. Stuart**, *First Presbyterian Church*, 1972–1986, 1987–1988, 1988–1991, 1991–1994, 1995–1998
6. ***Dr. W. W. Dickson**, *Hughey-Dickson Animal Clinic*, 1975–1993, 1994–1997, 1997–2000
7. *H. William Palmer, *Citizens National Bank of Gastonia* (trust officer), 1976–1977
8. Charles L. Myers, *Independence National Bank* (trust officer), 1977–1981
9. G. Sefton Stevens, *Independence National Bank* (trust counsel), 1981–1983
10. J. David Wright Jr., *BB&T* (trust officer), 1983–1986, 1986–1989, 1989–1992

* *Deceased*

Bold Denotes Board Chairpersons

11. *Craig M. Fielding, *Interstate/Johnson Lane*, 1986–1989, 1990
12. Elizabeth T. Stewart (Mrs. John G.), *community volunteer*, 1986, 1987, 1988–1991, 1991–1994
13. ***Sarah A. Abernethy** (Mrs. William B., Jr.), *elder, First Presbyterian Church and community volunteer*, 1990–1993, 1993–1996
14. Rev. Dr. John DeBevoise, *First Presbyterian Church*, 1992–1995
15. ***W. Alex Hall**, *BB&T/First Gaston Bank*, 1992–1995, 1995–1998, 1999–2002, 2002–2005
16. ***Dr. Lonnie A. Waggoner Jr.**, *Gaston Internal Medicine Clinic*, 1992–1995, 1995–1998
17. ***Daniel B. Moser**, *Threads Inc., Kings Industrial Supply*, 1993–1996, 1996–1999
18. **Elizabeth N. Sumner** (Mrs. H. Randolph), *Alala Mullen Holland Cooper*, 1994–1997, 1997–2000
19. *John A. Corbett, *BB&T*, 1996–1999, 1999–2002
20. Rev. Dr. David C. Stoker, *First Presbyterian Church*, 1998–2001, 2001–2004
21. Mayor Jennifer T. Stultz (Mrs. David R.), *Gaston County Education Foundation, Keep America Beautiful of City of Gastonia*, 1998–2001, 2001–2004
22. George L. Hodges III, *Crescent Resources*, 1998–2001, 2001–2004

Trustees and Directors

23. *Caroline H. Garrison (Mrs. Avery F., Jr.), *United Way of Gaston County (retired), Glenn Foundation (retired)*, 2000–2003, 2003–2006
24. **Ernest W. Sumner**, *A.B. Carter Inc.*, 2000–2003, 2003–2006
25. **Martha D. Eddins** (Mrs. Kenneth O.), *Wachovia Bank NA, (retired)*, 2004–2007, 2007–2010
26. **Dr. Malinda B. Lowery** (Mrs. John S.), *Multiple Choice Inc.*, 2004–2007, 2007–2010
27. Rev. Patrick H. Perryman, *First Presbyterian Church*, 2004–2005, 2005–2008, 2008–2010
28. Dr. Richard E. Rankin Jr., *Gaston Day School*, 2004–2007, 2007–2010
29. **Timothy T. Paschall**, *Paschall & Associates*, 2005–2008, 2008–2011

Directors

30. **Richard K. Craig**, *A. B. Carter Inc.*, 2006–2009, 2009–2012
31. Jane T. Sumner (Mrs. Robert T.), *Gaston County Schools (retired)*, 2006–2009, 2009–2012
32. Dr. Colleen Bridger (Mrs. Charles), *Gaston County Health Department*, 2010–2011
33. **Laura G. Lineberger** (Mrs. Lewis R.), *CaroMont Health*, 2010–2013, 2013–2016
34. **Julia M. Shovelin** (Mrs. Wayne F.), *Gaston County Schools (retired)*, 2010–2013, 2013–2016
35. Rev. Dr. John L. Frye Jr., *First Presbyterian Church*, 2010–2011, 2011–2014, 2014–2017
36. **H. Timothy Efird II**, *Standard Distributors*, 2011–2014, 2014–2017
37. **Charles W. Gallman Jr.**, *Grant Thornton*, 2012–2013, 2013–2016, 2016–2019
38. Robert H. Collis, *Collis & Associates*, 2012–2015, 2015–2018
39. Emily C. Craig (Mrs. Hubert M.), *Hospice of Gaston County/CaroMont Health*, 2012–2015, 2015–2018
40. Tyler S. Bullock (Mrs. G. Dale), *Gaston County Schools*, 2016–2019, 2019–2022
41. **Charles W. Pearson Jr.**, *Pearson Properties*, 2016–2019, 2019–2022
42. **Jennifer P. Davis** (Mrs. Fred D.), *Jennifer P. Davis & Associates LLC*, 2017–2020, 2020–2023
43. Gregory S. Sellers, *Spectrum Consultants Inc.*, 2017–2020, 2020–2023
44. Rev. Lauren Sease Vanacore (Mrs. Jeffrey R.), *First Presbyterian Church*, 2017–2020, 2020–2023
45. Richard C. Blackburn, *CaroMont Health Inc.*, 2018–2021, 2021–2024
46. Rev. David H. Christy, *First United Methodist Church*, 2018–2021, 2021–2024
47. Ann R. Davis (Mrs. Leslie G.), *Gaston Hospice (retired)*, 2018–2021, 2021–2024
48. David R. Rogers, *McCannon, Rogers, Driscoll and Associates LLP (retired)*, 2019–2022, 2022–2025
49. Rev. R. Dwayne Burks, *The Gateway Gaston*, 2022–2025
50. Vincent C. Wong, *Gaston County Administration*, 2022–2025

APPENDIX B

The Carrie E. and Lena V. Glenn Foundation Inc. Fifty Years of Grantmaking

995 Grants to 256 Unduplicated Recipients
Totaling \$9,062,621.15

Agency	Number of Grants	Total Distributions
Adolescent Health Council	2	\$3,000
Advocates for Healthy Citizens, d.b.a. HealthNet Gaston	3	\$14,000
African American Museum of History & Culture at Loray Mill	1	\$11,049
AIDS Council of Gaston County, The	2	\$20,000
Alexander Youth Network, Charlotte, NC	2	\$30,000
All Saints Episcopal Church	2	\$11,000
Alliance for Children & Youth	9	\$59,195
Alternative Community Penalties Program	1	\$5,000
American Legion Post 23	1	\$15,000
American Red Cross Carolina Piedmont Region – Gaston County Chapter	6	\$64,500
ANADAP of Gaston County	1	\$4,000
Arc of Gaston County, The	5	\$29,000
Armstrong Presbyterian Church	1	\$5,000
Art 1	3	\$10,850

Note: Agencies are listed by current names.

Agency	Number of Grants	Total Distributions
As One Ministries	7	\$61,000
Ashbrook High School	6	\$14,400
Autism Society of North Carolina, Raleigh, NC	1	\$3,000
BackPack Weekend Food Program	4	\$35,000
Baptist Children's Homes of North Carolina, Thomasville, NC	1	\$2,945
Barber-Scotia College, Salisbury, NC	1	\$7,000
Belmont Abbey College	5	\$35,000
Belmont Community Organization	7	\$36,500
Bessemer City Central Elementary School	1	\$3,300
Bessemer City High School	3	\$13,000
Bessemer City Middle School	1	\$8,200
Bit of Hope Ranch	1	\$10,000
Black Mountain Home for Children, Youth & Families, Black Mountain, NC	4	\$56,092
Boys & Girls Clubs of Greater Gaston	17	\$178,250
Camp Grier, Old Fort, NC	2	\$15,000
Cancer Services of Gaston County	11	\$85,317
Caring Program for Children, Raleigh, NC	2	\$17,000
Carolina Cross Connection	3	\$15,500
CaroMont Regional Medical Center	2	\$30,000
Carr Elementary School	1	\$4,000
Catawba Lands Conservancy, Charlotte, NC	9	\$94,537
Catawba Riverkeeper Foundation, Charlotte/ McAdenville, NC	10	\$70,000
Catherine's House	6	\$64,180
Charlotte Symphony Orchestra Society, Charlotte, NC	5	\$68,000
Charlotte Whitewater Park, d.b.a. US National Whitewater Center	1	\$250,000
Cherryville Area Ministries & Thrift Shop	3	\$33,150

Agency	Number of Grants	Total Distributions
Cherryville Chamber of Commerce	1	\$5,000
Cherryville Elementary School	3	\$5,105
Cherryville Historical Association	2	\$19,400
Cherryville Junior-Senior High School	2	\$3,000
Children's Home Society of NC, Greensboro, NC	2	\$35,000
Christ Community Baptist Church	3	\$6,500
Christ's Evangelical Lutheran Church	1	\$3,000
Christian Women's Job Corps of Gaston County	2	\$27,500
Citadel Foundation, Charleston, SC	1	\$1,000
City of Belmont	2	\$22,000
City of Cherryville	2	\$5,500
City of Gastonia	7	\$63,000
City of Mount Holly	2	\$18,000
Classroom Central, Charlotte, NC	6	\$50,000
Community Relief Organization of Mt. Holly, NC	1	\$5,000
Covenant United Methodist Church	1	\$15,000
Covenant Village	1	\$1,011
Cramerton Christian Academy	1	\$1,500
Crisis Assistance Ministry of Christians & Jews of Greater Gastonia	31	\$355,399.64
Crisis Pregnancy Center of Gaston County	6	\$54,500
Cumberland College, Williamsburg, KY	4	\$4,000
Daniel Jonathan Stowe Conservancy	7	\$53,000
Downtown Development Corporation Association Charitable Fund	1	\$5,000
Dream Center of Gaston County (Dream Center Academy)	8	\$110,000
East Gaston High School	3	\$13,000

Agency	Number of Grants	Total Distributions
Family Promise of Gaston County	8	\$107,000
Family Service, Inc. of Gaston County	6	\$42,375
Family Support Network [FSN]/Parents in Partnership	1	\$3,000
First Baptist Church, Gastonia	1	\$1,000
First Presbyterian Church, Dallas, NC	2	\$8,500
First Presbyterian Church, Gastonia, NC	26	\$127,908.08
First Presbyterian Church Lincolnton, Lincolnton, NC	1	\$5,000
First Presbyterian Church, Mount Holly, NC	1	\$1,725
First United Methodist Church, Gastonia	2	\$6,075
Flynn Fellowship Home of Gastonia, Inc.	3	\$12,800
Forest Heights Elementary School	1	\$4,000
Forestview High School	4	\$28,000
Forsyth Technical Community College, Winston-Salem, NC	1	\$1,000
Foundation for the Carolinas, Charlotte, NC	2	\$7,000
Friends of Crowders Mountain	1	\$2,500
Friends of the Gaston County Public Library	1	\$8,000
Friendship Baptist Church	1	\$5,000
Friendship Baptist Church Child Development Center	1	\$10,000
Futures for Kids, Raleigh, NC	1	\$5,000
Gaston Arts Council	12	\$89,650
Gaston Boys and Girls Club	6	\$74,719
Gaston Christian School	12	\$40,550
Gaston College	3	\$12,915.58
Gaston College Foundation	7	\$89,000
Gaston Community Action	2	\$12,500
Gaston Community Concert Band	6	\$34,520
Gaston Community Foundation	13	\$196,000

Agency	Number of Grants	Total Distributions
Gaston Concert Association	6	\$26,600
Gaston County	5	\$14,831.80
Gaston County Amateur Radio Emergency Service	3	\$3,650
Gaston County Council on Aging	1	\$1,011.98
Gaston County Department of Health & Human Services – Social Services Division	18	\$228,775
Gaston County Department of Health & Human Services – Public Health Division	6	\$79,240
Gaston County Education Foundation	6	\$88,000
Gaston County Extension Homemakers Association	1	\$2,500
Gaston County Family YMCA	7	\$70,000
Gaston County Medical Society Alliance	1	\$25,000
Gaston County Museum of Art & History	10	\$51,697.20
Gaston County Public Library	9	\$54,525.58
Gaston County Schools	14	\$230,961
Gaston County Sexual Assault Nurse Examiners	1	\$20,900
Gaston County Special Olympics	1	\$2,000
Gaston Dance	7	\$25,480
Gaston Day School	6	\$10,500
Gaston Emergency Medical Services	1	\$2,500
Gaston Faith Based Partners	1	\$5,000
Gaston Faith Network	1	\$16,500
Gaston Families for Drug-Free Youth	1	\$16,000
Gaston Hope in Christ Ministries	1	\$15,000
Gaston Innovation Group, Inc., d.b.a TechWorks Gaston	1	\$10,000
Gaston Literacy Council	26	\$297,859
Gaston Music Education Foundation	4	\$7,000

Agency	Number of Grants	Total Distributions
Gaston Residential Services	4	\$34,800
Gaston School of the Arts	9	\$86,950
Gaston Skills	8	\$75,257
Gaston Together: Communities of Excellence	19	\$440,290
Gastonia Alumnae Chapter Delta Sigma Theta Sorority	1	\$1,000
Gastonia Central Elementary School	1	\$8,500
Gastonia Cornerstone Christian Center	14	\$122,500
Gastonia Downtown Development Corporation	4	\$55,000
Gastonia Eagle's Track and Field	2	\$9,000
Gastonia Housing Authority	1	\$5,400
Gastonia Potters House	11	\$106,000
Gastonia Sister Cities Committee	2	\$7,000
Gaston-Lincoln Regional Library	5	\$100,500
Girl Scouts Carolinas Peaks to Piedmont, Colfax, NC	9	\$48,179
Gloria Dei Lutheran Church	1	\$1,500
Goodwill Industries of the Southern Piedmont, Charlotte, NC	1	\$7,500
Greater After Prison Support	1	\$6,535
Greater Gaston Baptist Association	1	\$3,000
Habitat for Humanity of Gaston County	10	\$168,406
HealthPlus of Gastonia	3	\$6,000
Heart Society of Gaston County	13	\$75,000
Highland Family Resource Center	6	\$59,200
Highland Junior High School	2	\$5,500
Highland School of Technology	1	\$5,000
Historic Preservation Foundation of NC, d.b.a. Preservation NC, Raleigh, NC	4	\$50,000
Historic York Chester Corporation	1	\$12,500

Agency	Number of Grants	Total Distributions
Holy Angels	4	\$17,549
Holy Angels Foundation	10	\$62,347
Holy Trinity Lutheran Church	1	\$7,500
Hope 4 Gaston	3	\$9,500
Horizon Youth Services	3	\$30,713
Hospice of Gaston County d.b.a. Gaston Hospice	13	\$229,500
Hospice of Lincoln County, Lincolnton, NC	2	\$10,000
House of Mercy	7	\$26,400
Hugh's Pond Volunteer Fire Department	1	\$3,000
Hunter Huss High School	5	\$24,450
Ida Rankin Elementary School	1	\$7,700
Interagency Resource Project	2	\$10,500
Junior Achievement of the Central Carolinas, Charlotte, NC	4	\$16,500
Junior League of Gaston County	1	\$5,000
Keep Gastonia Beautiful	7	\$42,250
Kintegra/Gaston Family Health Services	7	\$54,022
Least of These Carolinas	9	\$65,000
Lees McRae College, Banner Elk, NC	4	\$52,000
Life Enrichment Center, Kings Mountain, NC	1	\$12,000
Little Theater of Gastonia	1	\$15,000
Look-Up Gaston Foundation	1	\$2,500
Loray Girls' Home	3	\$50,000
Love's Chapel Presbyterian Church	1	\$5,000
Lowell Elementary School PTO	1	\$6,500
Lowell Volunteer Fire Department	1	\$2,500
Lucia Riverbend Volunteer Fire Department	1	\$4,000
Lutheran Services Carolinas, Charlotte, NC	1	\$7,500
Lutheran Support Group of Gaston	1	\$5,000

Agency	Number of Grants	Total Distributions
McAdenville Elementary School	1	\$5,000
MedAssist of Mecklenburg [NC MedAssist], Charlotte, NC	4	\$20,000
Mediation Center of the Southern Piedmont	8	\$48,500
Mount Holly Community Development Foundation	2	\$12,705
Mount Holly Middle School	1	\$500
Myrtle B. Hoffman Day Care Center	4	\$1,918.29
National Association of Students Against Violence Everywhere, Raleigh, NC	1	\$1,000
New Foundation Academy	1	\$10,000
New Hope Presbyterian Church	1	\$18,000
New Life Pregnancy Services, Inc.	4	\$15,000
North Carolina Blumenthal Performing Arts Center, Charlotte, NC	1	\$10,000
North Carolina Cooperative Extension Service	3	\$17,830
North Carolina Department of Human Resources, Raleigh, NC	1	\$520
North Carolina Public Television Foundation, Research Triangle Park, NC	1	\$10,000
North Carolina State University College of Veterinary Medicine, Raleigh, NC	1	\$5,000
North Carolina Veterinary Medical Foundation, Raleigh, NC	1	\$10,000
North Carolina Wildlife Federation, Charlotte, NC	4	\$31,000
North Gaston High School	2	\$3,000
Now Outreach	6	\$52,200
Off the Streets Program	6	\$50,000
Olney Presbyterian Church	4	\$38,000
On Eagles Wings Ministries, Charlotte, NC	1	\$20,000
Optimist International Foundation, St. Louis, MO	1	\$8,500

Agency	Number of Grants	Total Distributions
Partnership for Children of Lincoln & Gaston Counties	2	\$15,000
Phoenix Counseling Center	2	\$30,000
Piedmont Chapter of the Links, Inc.	1	\$5,000
Piedmont Community Charter School	1	\$3,125
Planned Parenthood of the Southern Piedmont and Carolina Mountains, Charlotte, NC	2	\$17,500
Pleasant Ridge Elementary School	1	\$7,500
Presbyterian Church of Lowell	1	\$8,500
Presbyterian Home of High Point Foundation, Colfax, NC	2	\$15,000
Presbyterian Home of High Point, High Point, NC	1	\$10,000
Presbytery of Concord	1	\$4,000
Presbytery of Western North Carolina, Morganton, NC	2	\$20,500
Prevent Child Abuse Gaston	2	\$20,000
Queens University of Charlotte, Charlotte, NC	4	\$16,500
Reality Concepts, Inc.	1	\$12,000
Reformed Theological Seminary, Charlotte, NC	2	\$7,000
Rotary Club of Gastonia	2	\$24,500
Rotary Foundation of Gaston County	1	\$10,000
Rumple Memorial Presbyterian Church, Blowing Rock, NC	1	\$5,000
Salvation Army	12	\$153,350
Salvation Army Boys and Girls Clubs of Gaston County	5	\$48,780
Schiele Museum of Natural History	11	\$117,000
Science Museums of Charlotte, Charlotte, NC	1	\$10,871
Serving our Community With Kindness in Springwood [SOCKS]	8	\$55,050

Agency	Number of Grants	Total Distributions
Sherwood Elementary School	1	\$10,000
Shining Hope Farms	3	\$12,500
Sisters of Mercy of North Carolina	1	\$15,000
South Point High School	3	\$14,000
Southeastern Council of Foundations, Atlanta, GA	1	\$500
Southminster Presbyterian Church	2	\$10,000
Southwest Middle School	1	\$12,000
Special Olympics-Gaston County	1	\$5,000
St. Andrews Presbyterian College, Laurinburg, NC	3	\$16,000
St. Catherine's School, Richmond, VA	2	\$20,200
St. Mark's Episcopal Church	2	\$2,000
St. Michael Catholic Church	1	\$5,000
St. Michael School	2	\$11,000
St. Stephen's AME Zion Church	1	\$250
Stanley Total Living Center	1	\$1,400
Stanley Town Revitalization Corporation	1	\$5,000
Straight Talk	1	\$2,000
Success's, Inc.	1	\$7,500
Temple Emanuel	1	\$5,000
Third Street Presbyterian Church	1	\$20,000
Town of Cramerton	2	\$27,000
Town of Ranlo	1	\$7,000
UNC Lineberger Comprehensive Cancer Center, Chapel Hill, NC	4	\$40,000
Union Presbyterian Church	3	\$30,000
Union Theological Seminary and Presbyterian School of Christian Education, Richmond, VA	1	\$5,000

Agency	Number of Grants	Total Distributions
United Methodist Agency for the Retarded, Charlotte, NC	3	\$11,500
United Way of Gaston County	22	\$331,900
Unity Place	3	\$57,000
Victory Christian Academy	1	\$1,500
Voices for Kids	4	\$7,600
W. Blaine Beam Intermediate School	1	\$2,288
W. P. Grier Middle School	1	\$5,000
W. P. Grier Middle School PTA	1	\$5,000
Wake Forest University Baptist Medical Center, Winston-Salem, NC	1	\$25,000
Warlick Academy	4	\$19,880
Warlick Family YMCA	5	\$125,000
Webb Street School	12	\$98,281
With Friends, Inc.	15	\$128,000
Woodhill Elementary School	5	\$44,800
WTVI, Charlotte, NC	1	\$2,500
York Chester Middle School	2	\$3,075

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Gracious and Eternal Lord,

We gather this day as grateful people, thankful for all the wonderful gifts from your hand and mindful that you bless your people so that they would be a blessing; especially we are thankful for the fruitful lives of Carrie and Lena Glenn. We are grateful for their wisdom and generosity, for their love of education and this community, and for the faithful stewardship with which they lived their lives. We are grateful for their vision and are mindful of all the ways you have manifested that vision in benefit to others over these past forty years. Continue to fulfill your bright hopes for the benefit of others through this foundation, grant that the glad celebration merely mirrors in part the joy on high, consecrate this work to your will and way, blessing this time to the building up of your people and your kingdom. In Jesus's name, Amen.

—Rev. Dr. John Lennig Frye Jr.

*Senior pastor, First Presbyterian Church, Gastonia,
2007–2019, and Glenn Foundation trustee, 2010–2017,
on the occasion of the Glenn Foundation's Fortieth
Anniversary celebration, October 17, 2012*

THE CARRIE E. AND LENA V. GLENN FOUNDATION
GASTONIA, NORTH CAROLINA