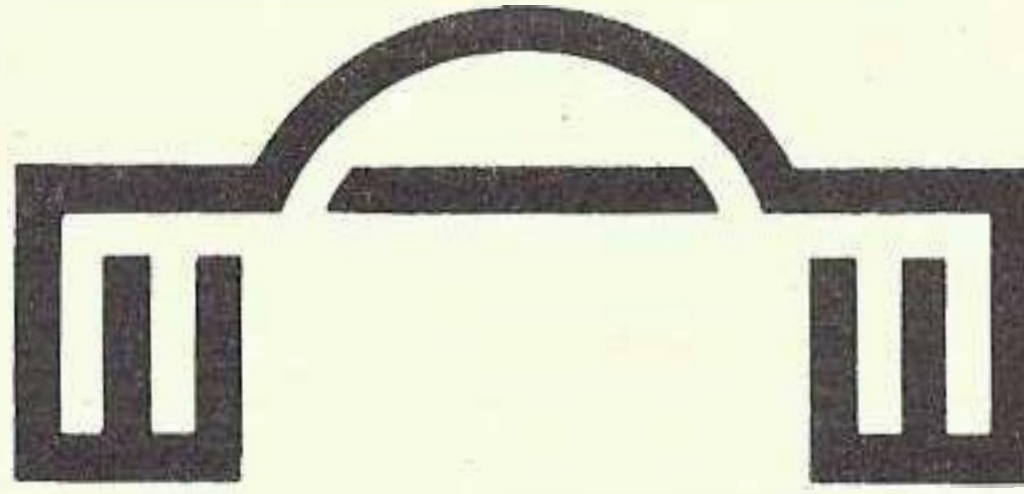




NORTH CAROLINA CENTER FOR
PUBLIC POLICY RESEARCH INC.

News Release

For Immediate Release: July 1, 1985

N.C. CENTER PUBLISHES GUIDE TO FOUNDATION AND CORPORATE GIVING

Nearly \$174 million is given away each year by foundations and corporations based in North Carolina, says the N.C. Center for Public Policy Research. The Center reports there are 589 foundations in N.C. which give away \$95.7 million a year. In addition, the Center notes that 81 corporations give away an additional \$78.2 million.

Information on these giving programs is contained in Grantseeking in North Carolina: A Guide to Foundation and Corporate Giving, a 637-page book released today. The book, compiled by Anita Gunn Shirley, is the result of two-and-one-half years of research. Ms. Shirley conducted the research for the Center under a special grant from the Z. Smith Reynolds Foundation of Winston-Salem.

Center director Ran Coble says, "The project was initiated for three reasons. First, as a public service, we wanted to provide all non-profit organizations in North Carolina with information on potential funding sources. Second, the guide contains details on what foundations and corporations give money for, so grantseekers don't waste time applying to people who may have no interest in their projects. And third, it should help foundations and corporations see what their peers are doing."

Foundation Giving

The research discloses some surprising findings. "We were amazed to find 589 foundations in this state," says Coble. North Carolina ranks 14th in the nation in the number of foundations. There is at least one foundation in 67 of North Carolina's 100 counties. In terms of dollars given, North Carolina foundations give nearly twice as much as any other southern state and more than the combined totals for Alabama, Kentucky, Mississippi, South Carolina, Tennessee, and Virginia.

However, only 17 of the largest foundations employ staff, and only 21 of the 589 foundations publish an annual report, brochure, or other information about their giving programs. "That lack of published information makes this guide all the more valuable," says author Shirley.

The top five foundations in terms of 1982 giving are:

- ° The Duke Endowment, Charlotte, \$36.1 million. The Duke Endowment is the 12th largest foundation in the U. S. It gives money to four designated colleges and universities -- Duke University, Davidson College, Furman University, and Johnson C. Smith University. It also gives to hospitals, child care, and religious organizations.

- ° The Z. Smith Reynolds Foundation, Winston-Salem, \$5.3 million. It gives only to non-profit organizations chartered in North Carolina. Its general areas of giving are education (43%), human services (18%), arts and humanities (15%), public policy (7%), criminal justice (7%), and the environment (4%). Recently, the Foundation has decided to give special emphasis to issues that impact on women and blacks in North Carolina and reaffirmed its special emphasis in criminal justice issues.

- ° The Cannon Foundation, Concord, \$4.6 million. Its main interests are higher education (47%), health and hospitals (32%), and arts and humanities (17%).

- ° The Smith Richardson Foundation, Greensboro, \$4.1 million. Its public affairs program is aimed at "promoting a vigorous economy and a free society" through grants to such organizations as the Heritage Foundation, a conservative think tank. The Foundation's other main thrust is leadership development. For example, it provides substantial support for the Center for Creative Leadership.

- ° The Winston-Salem Foundation, Winston-Salem, \$3.4 million. Established in 1919 as one of the nation's first foundations, it funds only groups in Forsyth County.

Other large N.C. foundations include the Kate B. Reynolds Charitable Trust and the Mary Reynolds Babcock Foundation, both of Winston-Salem. Kate B. Reynolds funds go almost exclusively for statewide health care projects and for the poor and needy in Forsyth County. The Babcock Foundation funds a wide variety of organizations in North Carolina and the Southeast in the areas of government accountability, youth issues, and social welfare. It also made five of the six largest grants in the environmental category in 1982.

Corporate Giving

Grantseeking in North Carolina also includes information on 81 corporate giving programs in North Carolina. Among the largest programs are those of R. J. Reynolds Industries, Burlington Industries, IBM, Duke Power Company, and The Wachovia Corporation. Some corporations, such as Burroughs Wellcome Company, give money directly from the corporation as well as through a company-sponsored foundation.

Coble says the N.C. Center is particularly grateful to Sherwood H. Smith Jr., Chairman and President of Carolina Power and Light Company, for his help in encouraging businesses to provide information on their corporate giving programs. Unlike foundations, whose tax returns are public records, corporate giving information is private. Smith wrote corporate executives across the state asking them to provide information on their grantmaking activities. Coble said, "We really appreciate Mr. Smith's help in making this the best statewide guide to fundraising in the country."

Nationally, corporate giving is approximately equal to giving by foundations. Corporations reported donating \$3.1 billion in 1983, while foundations gave \$3.46 billion. In North Carolina, the 81 corporate giving programs in the Center's guide gave \$78.2 million in 1982, while foundations gave \$95.7 million.

Advice to Fundraisers

Coble says non-profit groups should do their homework and not just use the book to send out form letters asking for money. "Good fundraisers will use the book to identify what foundations or corporations give to their type of program. And no matter what the program is -- whether it's arts councils, libraries, scholarships, day care centers, or environmental projects -- somebody in the guide has a history of funding it." There are foundations who give money for everything from psychical research in Chapel Hill to scholarships for former newspaper carriers of the High Point Enterprise. Grants from North Carolina foundations went as far away as the Afghanistan Relief Committee and as close to home as local food banks and the Andy Griffith Playhouse in Surry County.

Shirley points out that the guide includes a chapter on "How to Write a Grant Proposal" by fundraiser Beth Briggs, as well as "The Eleven Commandments of Corporate Fundraising" by John Bacon. Bacon is Assistant Secretary and Director of Corporate Contributions for R.J. Reynolds Industries, Inc.

The guide profiles each foundation or corporate giving program. Information is included on the address, phone number, names of board members, and geographic giving patterns. Also included is information on the average grant size, patterns of giving (such as an emphasis on colleges or hospitals), and examples of past grant recipients. In most cases, two years of grant information is available. For corporations which like to give in communities where they have plants, the locations of plant facilities are listed.

Grantseeking in North Carolina can be obtained from the N.C. Center for Public Policy Research for \$35.00 plus \$2.50 in postage and handling. Coble said other books of this type often cost several hundred dollars, but that the Center will hold the price of this first printing down as a service to non-profits. Checks can be sent to P.O. Box 430, Raleigh, NC 27602.

The N.C. Center for Public Policy Research is an independent research and educational organization based in Raleigh. It was founded in 1977 to study important public policy questions in North Carolina. The Center receives general operational support from the Mary Reynolds Babcock and Z. Smith Reynolds Foundations, 45 corporate contributors, and 625 individual members. Past research by the Center includes studies of all the boards and commissions in the executive branch of state government, a guide to the legislature, and a guide to all environmental organizations in North Carolina.

For more information, call Ran Coble at (919) 832-2839 or Anita Gunn Shirley at (919) 748-9222.

Josephus Daniels Charitable Foundation

215 S. McDowell Street
Raleigh, NC 27602
Wake County
(919) 829-4696

Contact person:

Frank A. Daniels, President IRS No.: 56-6065260

Board of Directors:

Frank A. Daniels, Raleigh, NC, President
Chairman of the Board, The News & Observer
Publishing Company
Frank Daniels, Jr., Raleigh, NC, Vice President
President and Publisher, The News & Observer
Publishing Company
M. L. Finch, Jr., Raleigh, NC, Treasurer
Treasurer and Controller, The News & Observer
Publishing Company

Purpose and Activities:

General purposes, with an emphasis on higher education. Grants also for social services, the arts, and hospitals and health care.

Limitations or Restrictions:

No grants to individuals. Restricted to area from Chapel Hill through Eastern North Carolina.

History:

The Josephus Daniels Charitable Foundation was established in 1964 in North Carolina with donations from The News and Observer Publishing Company. Josephus Daniels acquired the State Chronicle and The News and Observer in 1894. His son, Frank A. Daniels, is Chairman of the Board of The News and Observer Publishing Company and President of the Foundation.

Sponsoring Company:

News and Observer Publishing Company

Products:

Publishes The News and Observer and The Raleigh Times newspapers.

Corporate Address:

215 S. McDowell Street
Raleigh, NC 27602

Contact:

Frank A. Daniels, Chairman

Telephone:

(919) 829-4696

Company Location:

Raleigh (Wake County), NC

Does the company have a direct-giving program:

Yes; contact the corporation for more information.

Grants Analysis:

In 1982, the Foundation's contributions totaled \$206,789, down ten percent from the previous year's awards of \$229,134. As in 1981, the Foundation targeted the highest portion of its funds, (60%) toward educational institutions -- mostly colleges and universities. Grants in this category ranged between \$200 and \$30,000, with the average grant being \$5,371. Fifteen of the 19 recipients in this category (79%) received awards from the Foundation both in 1981 and in 1982.

Social service agencies, including the United Way, Salvation Army, Junior Achievement, League of Women Voters, and various civic associations, received the next highest portion of funds (20 percent). The largest grant in this category (\$27,835) went to the United Way. The other grants in this category were between \$50 and \$3,000.

Arts and humanities received 18 percent of the disbursed funds. The American Quadricentennial Corporation received the largest grant in this category (\$15,000). The Historic Preservation Foundation received the next largest award (\$7,500). Also receiving grants were the North Carolina Museum of Art, \$5,000; the American

Financial Data:

Year ended 12/31/81		Year ended 12/31/82	
Assets:	\$ 727,366	Assets:	\$ 963,471
Gifts Received:	\$ 302,877	Gifts Received:	\$ 314,563
Total Expenditures:	\$ 230,162	Total Expenditures:	\$ 208,566
Total Grants:	\$ 229,134	Total Grants:	\$ 206,789
Matching Gifts:	\$ 0	Matching Gifts:	\$ 0
Number of Grants:	62	Number of Grants:	68
High Grant:	\$ 30,000	High Grant:	\$ 30,000
Low Grant:	\$ 50	Low Grant:	\$ 10
Normal Grant Ranges:	\$ 100 to 1,500	Normal Grant Ranges:	\$ 100 to 1,500
Average Grant Size:	\$ 3,695	Average Grant Size:	\$ 3,041
Grants Approved for future payment:	\$ 0	Grants Approved for future payment:	\$ 0

Grants Awarded in 1982

Category	Number of Awards	Amount	Average Grant In Category	Percentage of Total Grant Dollars Awarded
Education	23	\$ 123,525	\$ 5,371	60%
Social Services	23	41,935	1,823	20
Arts and Humanities	16	37,489	2,343	18
Health and Hospitals	5	3,810	762	2
Environment	1	30	30	0
	68	\$ 206,789	\$ 3,041	100%

Dance Festival, \$2,500; the Raleigh Fine Arts Society, \$1,750; and Artspllosure, \$750.

Health care and hospitals received two percent of the allocated funds. The largest grant (\$2,500) was allocated to the Haywood County Hospital Campaign. Rex Hospital Foundation received \$1,000. The other awards in this category were between \$10 and \$250.

One \$30 grant in the environment category was allocated to the North Carolina Wildlife Federation.

Nearly 50 percent of the recipients received support from the Foundation both in 1981 and 1982.

Types of Support:

The Foundation provides grants for continuing support, seed money, emergency funds, deficit financing, general support, building funds, equipment and materials, land acquisition, renovation projects, and special scholarship endowments. In addition, the Foundation provides scholarship funds to individuals as well as institutions. Both single-year and multiple-year grants are awarded.

Recipient Types:

In 1982, typical recipients included colleges and universities; independent college funds and libraries; community funds; public interest groups; historic preservation organizations, dance companies, museums; hospitals and health agencies; women's groups; professional newspaper associations, and environmental protection groups.

Geographic Distribution:

The Foundation's grants are restricted to the area served by The News and Observer, from Chapel Hill through eastern North Carolina.

Sample Grants:

Following are examples of grants made by the Foundation in 1982.

Education	
Peace College, Raleigh, NC	\$ 30,000
University of North Carolina, Chapel Hill, NC	25,800
St. Mary's College, Raleigh, NC	15,000
St. Augustine's College, Raleigh, NC	10,000
Public Library of Johnston County	3,525
Fund for Higher Education	3,000
Independent College Fund of North Carolina, Winston-Salem, NC	1,500

Empire State College Foundation	300
North Carolina Academy of Science	200

Social Services

United Way	\$ 27,835
Junior Achievement	1,500
Lydia Baptist Emergency Home	250
Womens' Center of Raleigh, Raleigh, NC	250
Hospice of Wake County, Raleigh, NC	250
Raleigh Rape Crisis Center, Raleigh, NC	150
League of Women Voters	100

Arts and Humanities

American Quadricentennial Corporation, Raleigh, NC	\$ 15,000
Historic Preservation Foundation, Raleigh, NC	7,500
North Carolina Museum of Art, Raleigh, NC	5,000
American Dance Festival, Durham, NC	2,500
Raleigh Fine Arts Society, Raleigh, NC	1,750
State Capital Foundation, Inc., Raleigh, NC	1,500
Artspllosure, Raleigh, NC	750
Raleigh Chamber Music Guild, Raleigh, NC	400

Health and Hospitals

Haywood County Hospital Campaign, Waynesville, NC	\$ 2,500
Rex Hospital Foundation, Raleigh, NC	1,000
Multiple Sclerosis Society	50
American Lung Association	10

Environment

North Carolina Wildlife Federation, Raleigh, NC	\$ 30
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Application Procedures and Policies:

The Foundation does not publish an annual report, nor does it issue guidelines for submitting a proposal. A letter of inquiry or a visit are the preferred methods of initial contact with the Foundation. The Foundation does not require completion of an application form. It acknowledges the receipt of proposals and grants interviews with applicants when first applying for funds.

Funding Cycle:

Board Meeting Dates: Semi-annually: March and October

Application Deadlines: None

Final Notification: Varies