

# BE BOLD



**DOGWOOD**  
HEALTH TRUST

2019-2020 ANNUAL REPORT

# a time to be **BOLD**

Whether you were born and raised here or are newly arrived, we know you understand what makes this part of the country so special. Our spectacular landscape, friendly people, diversity of history and culture, ingenuity, and resourcefulness make WNC a one-of-a-kind place.

That is not to say our region is perfect.

We have struggled with persistent poverty and have marginalized too many people in our region, including the first people to live here and those living in communities of color. As a population, we have historically endured less-than-desirable health outcomes. And in this time of pandemic, we are bracing for even greater challenges to our economy, our health, and our opportunities for the future.

## **In times like these, we must be bold. Gratefully, we have two powerful assets.**

First, we have ourselves, and we are as strong as our mountains. We know the value of coming together, working toward shared goals, and creating a place where everyone can thrive.

Second, our entire region has a dedicated philanthropic ally in Dogwood Health Trust. Even though the Dogwood team has spent our first full year of operations rapidly adapting to a new pandemic-driven reality, our purpose, commitment, values, and guiding principles remain the same.

## **Dogwood Health Trust is committed to providing the bold, catalytic investments that move us beyond basic recovery and into a renaissance for the region.**

We will work closely with a wide range of partners, using the opportunities we find now to reinvent our approaches to the “upstream” causes of poor health and wellness such as building safe, affordable housing, improving education, creating more sustainable jobs, and providing access to quality health care.

On behalf of the entire Dogwood Health Trust Board and team, we are excited to engage boldly in this work with you: our partners and fellow Western North Carolinians.

With deepest commitment,



**Janice W. Brumit**  
Chair, Board of Directors



# OUR Purpose

To dramatically improve the health and well-being of all people and communities in Western North Carolina.

# OUR Commitment

Dogwood Health Trust is committed to diversity, equity, and inclusion. This commitment informs our purpose, our strategies, and our decisions.

*“Diversity, equity and inclusion are words that many people use these days, but we define those terms not by words alone but by our actions. Our board and staff constantly ask ourselves, ‘Who else needs a seat at our table? Whose perspectives can inform our work and help ensure success for everyone?’ There are so many rich and varied viewpoints, histories and lived experiences that make our region a vibrant place, and honoring each of those elevates us all.”*



**Casey Cooper,**  
Director (Qualla Boundary)

# OUR Values

**Compassion with Courage.**

We will be bold in pursuing our commitment to the people and communities of Western North Carolina by taking smart risks and investing in opportunities for profound impact.

*“Dogwood recognizes that all individuals in WNC should have fair access to healthcare and wellness. Compassion is the catalyst behind every decision we make as a community and as an organization. Compassion makes us stronger and is not measured by our level of concern about the struggle but rather by our acts of service. Courage helps us make smart decisions; take needed, informed risks; and make positive impacts for others now and for future generations.”*



**Jaqueline L. Godlock,**  
Director (Rutherford County)

**Sustainability with Integrity.**

We will bring transparency and humility in stewarding resources to support and strengthen Western North Carolina for generations to come.

*“Sustainability and integrity are actually two different values, combined to indicate how Dogwood intends to steward its resources over time. We have said from the beginning that we want Dogwood to be around, doing good, decades, if not centuries, from now. How we do that matters: transparently in our decision-making, not hidden; and with humility, not arrogance. Of this set of values, the one I think most important is humility. We do not, and never will, have all the answers. We must work in partnership with the communities and organizations of the region, listening to and hearing their strengths, willing to take a back seat when they are strong, enabling them when they ask for help.”*



**John R. Ball, M.D., J.D.,**  
Director and Chair,  
Covenant Compliance  
Committee  
(Buncombe County)

**Partnering with Purpose.**

We will foster collective impact by promoting collaboration and advancing shared learning.

*“Partnership is how we get our work done. Everyone may have their own entities, but we set aside egos to find common solutions for the issues we are facing. I believe Dogwood Health Trust is doing this well. For instance, our housing collaboration with the Gateway Wellness Foundation is a great example of how we are meeting folks where they are, truly partnering and not just writing a check. Also, on a number of occasions, board members have connected their established networks to the Dogwood team. When I see those individuals closely working with staff directly and not through us that speaks volumes about partnership.”*



**Dawna D. Goode-Ledbetter,**  
Director (McDowell County)

# OUR Goal

To help create a region where every generation can **live, learn, earn, and thrive** with dignity and opportunity for all (no exceptions).





# 2020

at-a-glance

By the end of 2020, the  
Dogwood Board will have  
approved more than

**\$47**  
million

in grants and other  
community investments,  
touching every county in  
Western North Carolina  
and the Qualla Boundary.

*Our investments include:*

## **Grants & Charitable Expenditures\***

- \$5 million for substance use disorder
- \$3.7 million in Immediate Opportunities and Needs (ION) grants
- \$9.0 million in COVID-19-related spending
- \$3.7 million in racial equity grants
- \$1.5 million to support the Census
- \$8.2 million in other grants to a wide range of partners
- \$657,000 to gain \$37 million in additional funding from outside sources through the Leverage Fund

## **Impact Investments**

- \$11 million in bridge loans for businesses and nonprofits applying for Paycheck Protection Program funds and Rapid Recovery funds during COVID-19
- \$4.5 million in investments and loan guarantees to establish testing and personal protective equipment production in the region

*\*Total projected to be paid by year-end 2020*

Dogwood Health Trust serves  
18 counties and the Qualla  
Boundary in Western  
North Carolina





# Creating an Entity as **unique** as Western North Carolina

FROM THE BEGINNING, WE KNEW THAT DOGWOOD HEALTH TRUST WOULD BE SOMETHING NEW AND DIFFERENT.

We are taking very seriously this once-in-a-lifetime opportunity to create something specifically for our region – which has been overlooked and underserved in many ways for so long – with a positive and powerful generational impact. We are creating an organization that will serve our region equitably, compassionately, and in partnership with our fellow residents with an eye toward a healthier and more prosperous future for everyone.

Although the sale of the assets of Mission Health System was not effective until February 2019, the work of Dogwood Health Trust started well before then. In May 2018, the nonprofit entity was established and the initial six board members named, with three more selected over the next few months. Those early board members spent months traveling the region, listening to community leaders, and carefully crafting the values and guiding principles that drive Dogwood's work today. Early leaders also paid close attention to the makeup of the board itself, establishing goals for diversity in terms of race, gender, and geography, as well as thought, perspective, and expertise.

Even the name of the new philanthropic entity was carefully considered. "Dogwood" honors Mission Health System's 135-year history of caring for the region. "Health" signals the change in focus for the charitable assets, from supporting clinical care to investing in improvements in social determinants of health. And the board intentionally chose to call this entity a "Trust" instead of a "foundation," to better capture the spirit of trust it aspires to hold with and inspire among residents of the region.



# Listening to the region

Our board and team members have made listening to all sectors of the community a top priority. So far, we have had conversations with hundreds of people throughout the region. More than 600 people tuned into our virtual Annual Meeting on October 28, 2020, and several hundred shared ideas and comments through online chat, quick polls, and surveys. We shared a summary of the feedback and comments on our website to help foster ongoing conversation with our community.

Hearing the perspectives and insights of community members from every corner of the region informs our work in a meaningful way and will continue to help us hone our strategic priorities.

"Thank you so much for the opportunity to listen to what has been going on in the region. Dogwood has been a great partner in these times, and we appreciate all of the support that you have provided to us to meet the challenges we have faced."

- **Ira Dove**, Health and Human Services Director, Haywood County

"On behalf of Mayor Dancy and the whole team here at the Town of Rutherfordton, we thank you for reaching out and for genuinely listening to how your goals match with our visions to improve our collective community."

- **Doug Barrick**, Town Manager, Town of Rutherfordton

With thoughtfulness and intention, Dogwood Health Trust will continue to listen and engage in conversation with our communities in order to serve our region effectively, equitably, compassionately, and in partnership with our fellow residents.



Since October 2019, we have pursued timely opportunities that laid the groundwork for longer-term strategies.

# BOLD Beginnings

## Tackling Immediate Opportunities and Needs

In January 2020, Dogwood launched Immediate Opportunities and Needs (ION) grants to help area organizations manage one-time occurrences and give us an opportunity to learn more about the nonprofit organizations in our region. When COVID-19 hit Western North Carolina, Dogwood allowed grantees to redeploy ION funds to support the areas of greatest need in their organizations.



PARTNER SPOTLIGHT

At 1:30 am on Saturday, July 11th, Shooting Creek Volunteer Fire and Rescue in Clay County received a call to assist the local police in a search for a juvenile with possible injuries. The search area was in deep woods and more than 100

acres. Using equipment purchased with an ION Grant, the Shooting Creek team was able to deploy and arrive on site in less than 30 minutes.

“In the past, even during daytime hours, it took over two hours to set up a four wheel-team. The equipment we deployed was able to cover a vast amount of territory in a short time frame. The juvenile was located within two hours and medivaced out.”

- **Pete Trocchia**, Chief Executive Officer, Shooting Creek Fire & Rescue

The new search and rescue equipment has already been used on several other searches in the area and is now recognized by other public safety organizations as a valuable part of emergency response.

**Goal:** Provide fast funding to organizations facing one-time immediate needs or timely opportunities – particularly to smaller, often-overlooked organizations and those addressing and promoting diversity, equity, and inclusion.

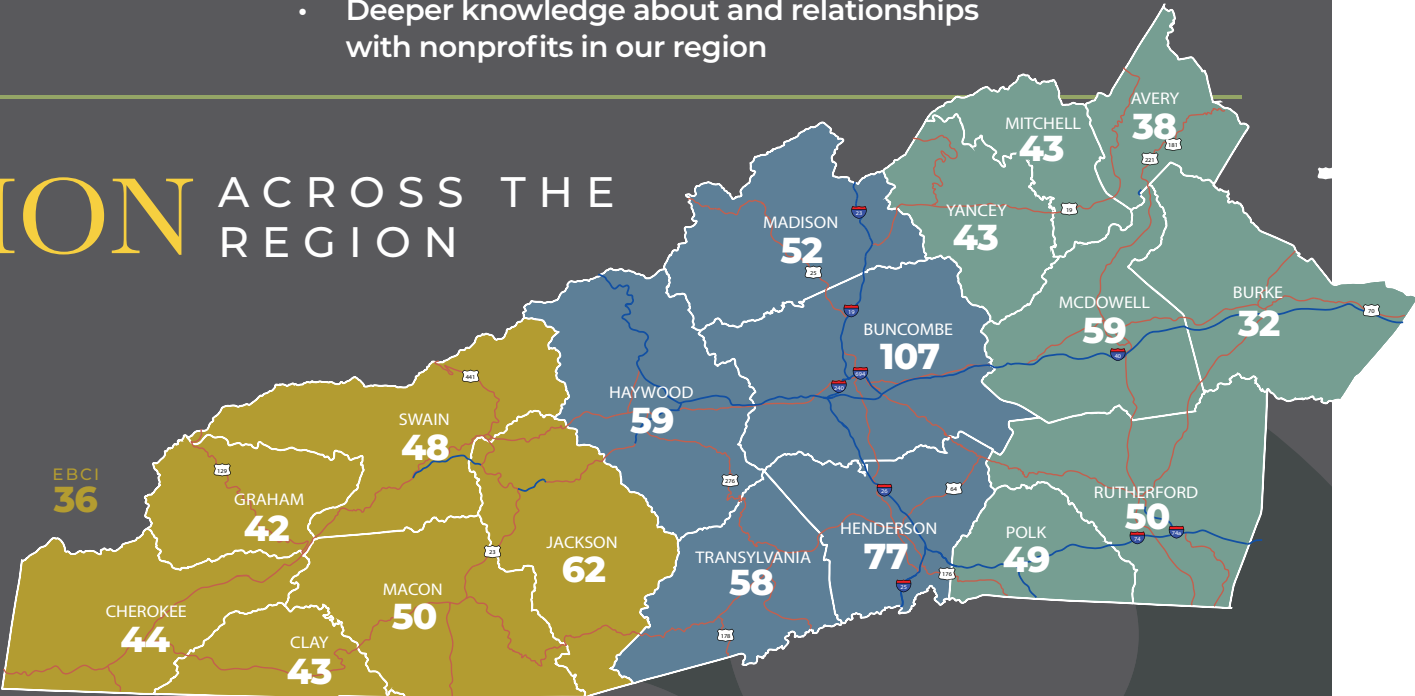
**Strategy:** Offer grants of \$500 to \$25,000 to organizations through a simple, online application process.

**Grants approved:** \$3.78 million in awarded grants

**Outcomes:**

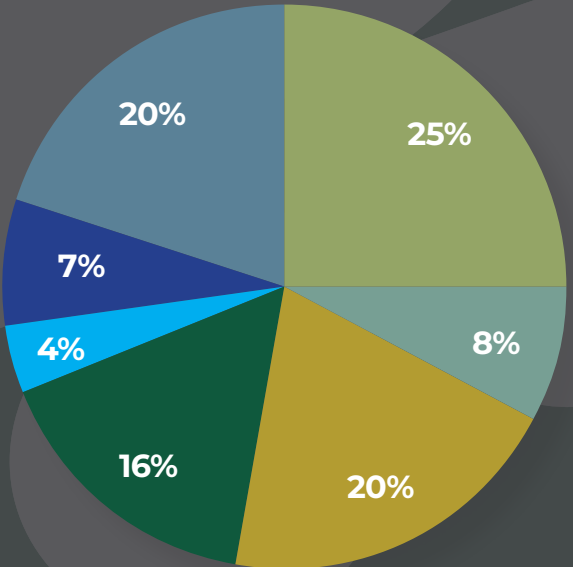
- 492 applicants
- 259 awards
- \$14,600 average grant size
- Deeper knowledge about and relationships with nonprofits in our region

## ION ACROSS THE REGION



## ION Funding BY REQUEST TYPE

- Building
- Community Outreach
- Equipment
- IT
- Other
- Planning
- Transportation





Leveraging our Region’s Strengths

One of Dogwood's first initiatives was the Leverage Fund which pairs nonprofits in our region with professional grant writers, so they can pursue funding from state and federal governments and large national foundations, drawing more investment into WNC.

The Leverage Fund was initially designed to support applications of \$100,000 or more, but in the wake of heightened attention on the long-term impacts of systemic racial inequities in the region, Dogwood expanded the scope of the Leverage Fund to include a focus on supporting historically underfunded organizations that wish to pursue smaller grant amounts.

In 2020, the Leverage Fund paired more than 70 grant writers with organizations. And although there are still 25+ grants pending award notification, Leverage Fund partnerships have brought more than \$37 million to Western North Carolina organizations.

Goal: Bring **\$8 million** in outside grant funding into WNC by year-end 2020

Strategy: Match nonprofits with expert grant writers to pursue private, state, and national funding sources

Investment: **\$657 thousand** in grant writer fees and matching funds

Outcomes: **\$37.3 million** outside funds secured for the region

Return on investment: **47:1**

PARTNER SPOTLIGHT

Pandemic and economic stressors have led to increases in domestic violence, which means an increased need for legal assistance for survivors. But pursuing funding – particularly from federal sources – is time consuming and complicated.

With help from Dogwood’s Leverage Fund, Pisgah Legal Services (PLS) received a \$600,000 Violence Against Women Act grant directly from the U.S. Department of Justice. This grant will help PLS sustain legal services to survivors of domestic violence, dating violence, sexual assault, and stalking who are seeking relief in legal matters to escape abuse and rebuild their lives. In addition, it will help PLS expand services to help more immigrant and rural survivors of abuse.

“This grant is for three years, at \$200,000 per year, which is the longest grant period we have. Our staff is extremely committed, hardworking, and professional, and having access to additional grantwriting expertise during an extremely busy time helped us secure funds we wouldn’t have had the bandwidth to pursue. As a result, we can provide legal protections and assistance to those facing violence.”

- **Jim Barrett**, Executive Director, Pisgah Legal Services



Katherine Freeman  
at Rutherford County Courthouse



Isabel Carson at  
Jackson County Courthouse

photos credit Michael Oppenheimer

Pursuing Healthy Opportunities

In November 2019, the North Carolina Department of Health and Human Services announced Healthy Opportunities, a Medicaid pilot program that would pay nonprofit providers for services related to housing, transportation, food security, and interpersonal violence. Dogwood stepped forward to serve as the Lead Pilot Entity by convening a wide range of partners across Western North Carolina to complete and submit a regional 900+ page application. In May 2020, the department announced it had suspended its evaluation of proposals “to support North Carolina health care and human service providers as they focus all available resources to respond to the COVID-19 pandemic.” We are hopeful that conversations will continue when COVID-19 is no longer a primary threat.



“To have Dogwood’s experienced leaders come in and hit the ground running – and be so appreciative of the work we had already done – really felt like a partnership and not a top-down process.”

- Glenn Wise, Programs Director, MANNA FoodBank







# BOLD. Strategies

The Dogwood Health Trust endowment is generous, but it is dwarfed by the many opportunities to invest in the health and well-being of the region. That means we must be smart, opportunistic, and collaborative in the pursuit of opportunities that will deliver lasting, positive impact. Dogwood Health Trust has worked to focus community investments on addressing the social determinants of health – the non-clinical issues and circumstances that have a direct and often dramatic effect on life outcomes.

Although the social determinants are many, in early 2020, our board defined four strategic priority areas that weave together to form the basis of a healthy and fulfilling life: **Housing, Education, Jobs & Economic Development**, and **Health & Wellness** (including healthcare access).



**Live:**  
**Housing** – A safe place to live is crucial to economic stability and basic health.



**Learn:**  
**Education** – A solid education opens the door to more robust opportunities in work and life.



**Earn:**  
**Jobs & Economic Development** – A good job allows for greater access to housing stability, economic security, and health.



**Thrive:**  
**Health & Wellness** – Preventive care and quick and effective responses to illness increase ability to succeed in school and employment.

In reflections shared by colleagues across the region, there has been widespread alignment of Dogwood's strategic priorities with partner priorities and identified community needs. While there are myriad ways to invest in the health and well-being of the region, our bold goal is to deliver generational impact. In this pursuit, we must be strategic, creative, thoughtful, and collaborative. The following pages highlight what we have accomplished so far and what we have committed to accomplish over the next several years.







# Housing

## LIVE

Since affordable housing is in extremely short supply in our region, our efforts seek to preserve and increase availability in ways that build upon the strengths, expertise, and assets of area partners. To amplify our impact throughout the region, Dogwood may have many roles, including bridge funder, loan guarantor, or equity partner, in addition to providing strategic grant funding.

Our first investment in 2020 was in a unique partnership in McDowell County to create 168 units of affordable workforce housing. We also provided grants to aid in the construction of eight single-family supportive housing units in Henderson County and provided grants for pre-development costs for other projects in Buncombe, Mitchell, and Rutherford Counties representing an estimated 582 additional units.

Housing is about much more than creating new homes. Dogwood will also focus on helping residents stay in existing homes safely and on development of a strategy to reduce homelessness, addressing numerous and complex contributing issues within all of our strategic priorities.

### PARTNER SPOTLIGHT

Affordable housing is a challenge even for families in the workforce. But thanks to the collaborative efforts of many organizations in McDowell County, 168 new units of workforce housing will begin construction in 2021. This unique partnership is led by Gateway Wellness Foundation, McDowell County Government, the City of Marion, McDowell Technical Community College, Housing Assistance Corporation (a nonprofit housing developer), and Dogwood Health Trust.

“The lack of affordable housing is a major challenge in McDowell County. Dogwood Health Trust stepped up on this issue in a major way, supporting leadership and expertise to make workforce housing a reality for our community.”

- **Chuck Abernathy**, Executive Director, McDowell Economic Development Association

Grants approved in 2020: **\$3 million**

Goal: Invest in the creation of **500** affordable housing units by the end of 2020.

Strategies:

- Support evaluation and pre-development of affordable housing sites
- Build new units
- Preserve affordable units
- Support home rehabilitation







# Education

We are committed to investing across all sectors of education: early childhood, K-12, and post-secondary. With the significant impact of COVID-19 on the education sector, our focus and initial investments have been aimed at helping schools at all levels — from early learning to higher education – face the incredible new challenges they are experiencing. Our funding to date has supported WiFi hotspots, learning pods, cleaning supplies for safe opening, COVID-19 testing, and programs to support remote learners. We will develop and share long-range goals and strategies for education in 2021.

## PARTNER SPOTLIGHT

A middle school “A” honor roll student who is one of five children, grandparents raising a middle schooler, and a single mom struggling to make ends meet. These are the Madison county residents able to check one less worry off their lists thanks to a March donation of WiFi hotspots to Western North Carolina school districts by Western Region Education Service Alliance (WRESA) through funds provided by Dogwood Health Trust.

“We are grateful for the generosity of Dogwood Health Trust to provide hotspots to school systems. The collaboration between WRESA and Dogwood has allowed the school systems to identify needs to assist students in remote learning environments.”

- **Jan Webster**, Executive Director, WRESA

Madison County School District was able to supply 80 families with hotspots. Madison Middle School Principal Monica Ponder says, “These are families who cannot afford internet for their homes. Our families and students are appreciative of this service. Some families, upon being able to purchase internet on their own, have returned hotspots in hopes that other families could use them.”



## Grants approved in 2020: \$1.5 million

**Goals & Strategies:** Goals and strategies for our Education Strategic Priority area will be developed and shared in 2021.

## PARTNER SPOTLIGHT

“Members of the Dogwood Health Trust team took time to meet with leaders in higher ed in order to understand what our unique challenges were and how they could partner with us to support a safe reopening during a pandemic. I really appreciate their willingness to listen and then act on our suggestions in order to support education and workforce training opportunities throughout the region.”

- **Dr. Laura B. Leatherwood**, President, Blue Ridge Community College

“Our fall semester included a hybrid of online and in-person learning. We used funding from Dogwood Health Trust to purchase disinfectant wipes for students and faculty to use in classrooms, as well as thermometers and pulse oximeters for students who are required to quarantine while recovering from COVID-19 or waiting for test results. We truly appreciated the flexibility to be able to use the funds in the way that was most productive and helpful for our students and campus community.”

- **Dr. Kelli R. Brown**, Chancellor, Western Carolina University







# Jobs & Economic Development

When WNC's tourism economy was hit especially hard during the pandemic, it shined a light on what our region already knew – that we must diversify. Using the philanthropic tools of impact investing and program-related investments, Dogwood Health Trust will help our region's economic developers attract and grow local businesses to create a more dynamic economy with jobs that support families in their pursuit of healthy and fulfilling lives. Our investments in jobs began by providing \$11 million in bridge loan funding to secure jobs threatened during COVID-19. These dollars have since been repaid. Now, our work is rapidly expanding to include support for broadband access, workforce training, diverse entrepreneurship, and much more to come.

## PARTNER SPOTLIGHT

America Mauricio-Becerra opened her first cafe in Burnsville in October 2017, after training and a business loan from Mountain BizWorks. A little more than a year later, in early 2019, she switched to a new location and format in Spruce Pine, opening Las Cruces Latin Fusion to a welcoming community.

The first year was a great success, and then came COVID-19. At first, her eight employees were covered by unemployment while the restaurant obeyed state shutdown orders. But when those benefits ran out, America needed another solution. Fortunately, Dogwood Health Trust partnered with Mountain BizWorks to help small businesses – especially those owned by women, minority, or rural residents – access emergency forgivable loan funds through the SBA's Payroll Protection Program (PPP).

**“Mountain BizWorks called to ask if I needed a PPP loan to support my business and offered to help with my application. I did not have a lot of money in savings because I had invested in my building, so the PPP funding was critical. My first employee returned in July, and since then we have grown back into a staff of eight.**

**I am so glad that Mountain BizWorks exists here in this area. I feel proud because I got my first Mountain BizWorks loan four years ago, and now I am building a successful business in this rural area and providing jobs.”**

**- America Mauricio-Becerra**, Owner, Las Cruces Latin Fusion

Grants approved in 2020: **\$552,450**

**Goal:**

- Retain or catalyze **5,000+** jobs in our region
- Diversify regional economy through advanced manufacturing and other suitable sectors

**Strategies\*:**

- Provide bridge funding to maintain jobs during COVID-19
- Attract/expand companies in WNC
- Expand diverse entrepreneurship
- Support workforce training
- Expand rural businesses
- Expand broadband access

*\*Implemented in a manner consistent with our charitable purpose.*







# Health & Wellness

## THRIVE

Dogwood's COVID-19 initiatives have been central to our short-term work in health and wellness (see pages 28-31), along with bold goals to address substance use disorder. We will develop and share other long-range goals and strategies for health and wellness in 2021.

### PARTNER SPOTLIGHT

“As the Pandemic spread across Western North Carolina, the PPE shortages impacting medical practices required a unified response from many partners who were willing to rapidly mobilize and work together. In April 2020, Western Carolina Medical Society (WCMS) began sourcing and distributing much-needed free PPE to medical practices, including over 10,000 surgical masks and face shields. With help from Dogwood Health Trust, WCMS was then able to acquire and distribute for free more than 8,000 isolation gowns to medical practices throughout Western North Carolina. WCMS is currently poised to distribute an additional 148,000 KN-95 masks, 1,700 gowns, 5,000 pairs of gloves, 2,000 face shields and 250 IR thermometers thanks to Dogwood Health Trust. This partnership has made it possible for us to assist WNC medical practices during what has been a tremendously difficult year.”

- **Miriam Schwarz**, Chief Executive Officer/  
Executive Director WCMS



## Addressing Substance Use Disorder

More than 50,000 people in WNC struggle with substance use disorder, and overdoses claim the lives of more than 200 WNC residents annually. Upon its creation, Dogwood Health Trust committed to providing \$5 million per year for five years for the purpose of funding programs and services dedicated to addressing substance use disorder for residents of Western North Carolina in conjunction with programs developed or to be developed by the Secretary of the North Carolina Department of Health and Human Services.

In 2020, Dogwood granted \$5 million in work to address substance use disorder in 18 counties and the Qualla Boundary in WNC. By targeting opportunities already based within these counties and supporting work that is locally driven, we are seeing early wins. For 2020-2021, our partners' work is projected to exceed our 40% opioid fatality reduction goal and save more than 70 lives.

“We are standing on the shoulders of giants; the organizations we are partnering with are so committed, so passionate about this work. They are driving the impact we are seeing.”

- **April Bragg, Ph.D.**, Senior Impact Officer, Dogwood Health Trust







PARTNER SPOTLIGHT

In recent years, Harm Reduction, a movement started in the 1980s with an established set of principles, has become more talked about but not more widely understood. Since its founding, Steady Collective has been committed to the principles of Harm Reduction through its investment in and support of programs that make the rights of people who use drugs central to their mission and daily operation.

“We want to grow the movement with integrity and intention, and we know that new Harm Reductionists need education and support to run quality programs that continue the tradition that Steady Collective is a part of.”

- **Hill Brown**, Co-Director of Steady Collective

With support from Dogwood, Steady Collective hired a full-time registered nurse to provide wound care to the uninsured at outreach events and to offer consultation and direction to Holler Harm Reduction, a new Harm Reduction program in Madison County. Early treatment of injection-related injuries prevents complications that could require surgery or extended hospital stays, and onsite wound care also allows people who have experienced discrimination in doctor's offices or hospitals based on their use to receive non-judgemental care.

“We are so grateful for this new partnership with Dogwood Health Trust and the ways it makes it possible for Steady Collective to keep showing up for people using drugs in this region of Appalachia,” Brown added. “We are honored to be able to afford people the care that they need and want in a low barrier, dignified way.”

“The opioid epidemic has ripped families apart all across our state. Confronting the deadly disease of addiction has been my top priority as North Carolina’s Attorney General. We will not be able to effectively fight back unless we bring people from all over our communities – including health care experts, law enforcement officers, volunteers, educators, government officials, treatment and recovery professionals, prevention experts, communities of faith, and business leaders – to work together. Committed partners like Dogwood Health Trust are key players in helping us develop innovative solutions and save lives. Together, we can make North Carolina safer and stronger”

- **Josh Stein**, North Carolina Attorney General

## Grants approved in 2020: **\$5 million** for substance use disorder

**Goal:**

- Reduce opioid overdose deaths by 40% in 2020
- Reduce substance use in minority populations
- Reduce substance use in teens

**Strategies:**

- Pilot program for free, home-delivered NARCAN
- Expansion of syringe exchange sites into multiple rural counties in WNC
- Expansion of Naloxone access and availability by filling short-term gaps in supply
- Expansion of medication-assisted treatment access to justice-involved and other uninsured populations
- Therapeutic adventure programming to build resiliency in youth
- Wraparound care for individuals of color in SUD recovery leaving incarceration







# OUR COMMITMENT TO Racial Equity

Equity is a fundamental commitment of the Dogwood Health Trust Board. That commitment has included specific equity goals in every initiative that we undertake. But this past summer our commitment became even stronger. On June 22, 2020, after days of deep discussion and reflection among staff and board, Dogwood Health Trust issued a statement, “Our Commitment to Equity,” to the community. The full statement is available on our website.

## Racial Equity Allocation

Our \$5.5 million racial equity allocation for 2020-2021 seeks to help repair and restore the damage caused by centuries of systemic racism in communities of color throughout our region. We recognize that this work must begin by acknowledging the true causes of disparities and creating space for trusting relationships to develop. As a first step, we awarded \$2.8 million in Racial Equity Community Grants of up to \$25,000 to support organizations led by and serving communities of color in ways they determined to be most effective.



“While we know that most of our investments must be strategic to dramatically improve health and well-being, we also are keenly aware that organizations serving our community have their own unique and pressing needs and opportunities. We support those through responsive grantmaking, like our ION or Racial Equity grants, to give them the flexibility to invest in their own operations as they deem most appropriate.”

- Jacquelyn S. Simms, Director and Chair, Program and Grants Committee

## Grants approved in 2020: \$3.7 million

- Goals:**
- Build trust with community
  - Infuse resources into community
  - Lessen the impact of justice system inequalities
  - Build foundation for long-term systems change

- Strategies:**
- Develop a portfolio for community building, trust building, and pre-development funding – including \$2.8 million in Racial Equity Community Grants
    - 188 applicants
    - 130 awardees
    - \$21,884 average grant size
  - Explore ways to support justice system improvements
  - Initial education pilots
  - Leverage existing strategies in all four strategic priority areas







# Count me in

## 2020 Census

In the national Census, Western North Carolina has historically been among the most undercounted regions in the country. To support increased Census counts in our region, the board allocated \$1.55 million for a bold strategy that included conducting a region-wide multi-media advertising campaign and working with county Complete Count Committees and nearly 100 nonprofit partners to increase the count. The result: When the Census ended on October 15, the average county response rate across Western North Carolina had increased by 2.2% over the 2010 response rate, outperforming the average increase across the state and the nation. Even more, 10 counties and the Eastern Band of Cherokee Indians exceeded their previous 2010 rate of count. All totaled, this equates to roughly **\$18 billion** in potential funding for the region over the next decade.

### PARTNER SPOTLIGHT

“The Census provides jobs and a source of income for people in the community. By tapping into our networks across the region, we were able to connect people right away to boost response rates. That has been wonderful!”

- **Adriana Chavela**, Executive Director, Hola Carolina

I knew the Census helped the community, but not to what extent. When I found that out, I knew there was a lot at stake because we are very dependent on grants and government funding. I am thankful to Dogwood for their investment in our community, and I am proud that our efforts helped Graham County surpass our 2010 self-response rate.

- **Rev. Eric Reece**, Robbinsville United Methodist Church

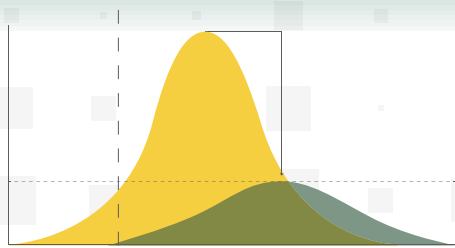




# BOLD Response

As soon as it became clear that **COVID-19** would pose a serious health and economic threat to Western North Carolina, Dogwood Health Trust responded.

Our board initially approved an allocation of \$2.5 million to address COVID-19 and then quickly increased that to \$10 million to effectively address the needs for testing, personal protective equipment (PPE), clear messaging, and financial support for nonprofits, schools, and businesses hindered by the mandatory shutdown. In addition to responding to immediate needs, we sought to deliver meaningful impact in ways that effectively launched our strategic initiatives and laid the groundwork for systems change. To that end, we developed a five-prong strategy, reflected below, with equity components embedded in each component. As of year-end 2020, our board approved \$9 million in COVID-19-related grants, reserving some of our allocation for needs in the coming months.



## Reduce transmission to flatten the curve

- Sourced, distributed, and funded thousands of COVID-19 test kits to support public health's testing and contact tracing efforts in multiple counties and the Qualla Boundary.

- Supported COVID-19 testing events in Hispanic/Latino and African American communities with trusted local partners and federally-qualified health centers.
- Collaborated with local Spanish-language media to translate and distribute mainstream media articles on a daily basis.
- Launched multi-media campaigns in all 18 counties and the Qualla Boundary, focused first on "stay home" and then "wear a mask" messages with additional targeted campaigns to address racial disparities and health risks.
- Developed an online screening tool deployed in McDowell County with the goal to scale in the region. (After the state launched its own screener, McDowell County made the decision to discontinue theirs, but they were proud to be the first in the region to lead the way.)
- Supported the creation of a dedicated local COVID-19 testing lab in Western North Carolina.



## Provide the region with needed supplies and equipment

- Assessed the critical needs with partners, acquired more than \$3 million worth of PPE and equipment (e.g., gloves, disposable masks, face shields, hand sanitizer, ventilators, and thermometers), and distributed as in-kind grants to frontline agencies and emergency operations centers. Later provided grants for additional purchases.

- Partnered with local companies to shift their production lines to the manufacture of PPE.
- Prioritized distribution to rural counties, first responders, and frontline healthcare workers as well as to at-risk members of communities of color, including more than 33,000 masks to partners for distribution to Henderson, Buncombe, Rutherford, Burke, and Macon Counties as well as to the Eastern Band of Cherokee Indians.
- Granted \$147,000 in direct funds to partners to purchase and distribute masks and hand sanitizer.
- Supported a permanent, dedicated source of mask production through investments in local companies.



## Mitigate the social impact

- Provided \$300,000 in grants to school districts to purchase cellular WiFi hotspots for rural school buses, teachers, and graduating seniors.
- Awarded \$100,000 in funding to support the preparation of 87,000 pre-packaged meals for no-contact drop off to the region's vulnerable populations, especially older adults.
- Assisted community colleges, four-year colleges, and universities with \$294,000 in funding for safe reopening.

- Provided \$50,000 in support for emergency homeless shelter needs, both financial and in-kind PPE.
- Supported the distribution of more than 25,000 pounds of processed chicken and 700 live hogs from the eastern part of the state to families through Western North Carolina in partnership with WNC Communities.



## Collaborate with other funders

- Invested \$125,000 in the Community Foundation of Western North Carolina Emergency Response Fund and \$100,000 in the One Buncombe Fund.
- Purchased laptops for the expansion of United Way's 211 system to handle increased call volume.



## Provide bridge funding until emergency funds flow

- Partnered with Mountain BizWorks to support targeted outreach to rural, minority, and women-led nonprofits and small businesses for Paycheck Protection Program (PPP) loans with an investment of \$10 million (since repaid). These funds helped 380 area nonprofits and businesses sustain more than 2,100 jobs across WNC.
- Invested \$1 million in the NC Rural Center Rapid Recovery Fund in partnership with Golden Leaf Foundation.





# Countless Stories OF Courage AND Compassion

Throughout the COVID-19 crisis, we have been humbled, inspired, and grateful for the thousands of individuals who have given of themselves to help the region through this pandemic. Western North Carolina has created countless models for pandemic response, and we have been honored to play a small part in this work. Here are just a few highlights.



*Dogwood provided multiple PPE grants to Hola Carolina to distribute masks, sanitizer, and other PPE to hotspot counties for the Hispanic and Latino communities. Hola also partnered with Dogwood and Blue Ridge Health to host COVID-19 testing events.*



*Asheville Buncombe Institute for Parity Achievement (ABIPA) used PPE grants from Dogwood to distribute masks, sanitizer, and other PPE to hotspot counties for the African American community.*

## Grants approved in 2020: \$9 million

- Goals:**
- Reduce transmission to flatten the curve
  - Provide the region with needed supplies and equipment
  - Mitigate the social impact
  - Collaborate with other funders
  - Provide bridge funding until emergency funds flow



*PPE grants to BeLoved Asheville helped ensure that masks and sanitizer were distributed to communities of color.*



*County "strike teams" coordinate responses to outbreaks in senior congregate living facilities, minimizing the likelihood of further transmission and coordinating a multi-agency response.*



*WNC Communities distributed thousands of pounds of food to help prevent hunger in the face of lost or reduced incomes during COVID-19.*



*Kitsbow, a cycling apparel manufacturer in Old Fort, was one of the first companies in the area to switch from regular production to mask production, and Dogwood made an early purchase to distribute to community organizations.*



*When WNC's first COVID-19 outbreak occurred in Brasstown, the health department used testing secured by Dogwood to conduct contact tracing and contain viral transmission in the community.*

"JeWana and her team at Asheville Buncombe Institute of Parity Achievement have been incredible partners in helping us to reach essential workers in the African American community with masks and other PPE. They are always willing to step up to the plate and serve whenever duty calls."

**- Scottie Parks,**  
Impact Officer,  
Dogwood Health Trust





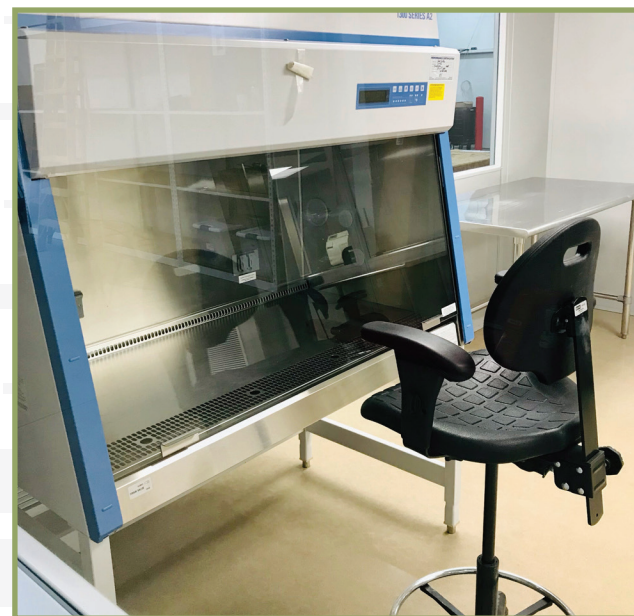
# BOLD Action

## Impact Investing

While the pandemic has caused significant economic hardship in WNC, it has also opened the door to economic opportunities. As a private foundation, Dogwood can do more than make grants. We can also use our assets to help other organizations acquire access to capital – which they can then use to create beneficial opportunities for the region, such as affordable housing or jobs in businesses that contribute to improving the health and wellbeing of communities. This practice is called impact investing, and it can take the form of bridge loans, loan guarantees, start-up capital, or an equity investment.

In July 2020, our board approved impact investments in local companies totaling \$5 million to create new lines of COVID-19 testing at Sanesco Health, an established lab, as well as to expand permanent mask and gown production at Diamond Brand Gear and support the production of new PPE fabrics at Green Key.

These impact investments not only ensure that our region has a greater capacity for processing tests and a dedicated supply of PPE but also provide new jobs and a new permanent industry for the region.



## PARTNER SPOTLIGHT



When Sanesco Labs in Arden saw COVID-19 advancing on Western North Carolina, they knew they had to act quickly to help address shortages and long turnaround times for virus testing. This family-owned lab began to look at options for expansion and was introduced to Dogwood as a potential source of capital. Unlike other investors, Dogwood's purpose of providing loan guarantees was to secure a dedicated source of COVID-19 testing for the region as well as the creation of new jobs.

*“We were extremely excited by Dogwood’s mission and directive. Our hearts quickly got attached to the project. We knew we could make an impact with COVID-19 but realized we could make a bigger impact right in our own backyard with a partner who is deeply rooted here.”*

**- Marcos Romero**, President, Sanesco Labs

By the end of 2020, Sanesco will operate six different testing systems for COVID-19 and will add nearly 50 well-paying jobs over the next two years. With a capacity to run more than 1,200 tests per day and a commitment to provide 10% of testing for free to those without insurance, Sanesco stands to deliver a significant return on Dogwood's investment in the form of both jobs and health in the region.

## Our Role in Monitoring Compliance

Dogwood Health Trust has a limited role in ensuring that HCA (the purchaser of the assets of Mission Health System) meets certain obligations stated in the Asset Purchase Agreement (APA) specifically pertaining to Mission Hospital (Memorial Campus), Angel Medical Center, Blue Ridge Regional Hospital, Highlands-Cashiers Hospital, Mission Hospital McDowell, Transylvania Regional Hospital, CarePartners Rehabilitation Hospital, and the Mission Children's Hospital Reuter Outpatient Center.

Dogwood Health Trust engaged an Independent Monitor, Gibbins Advisors, to provide objective monitoring of HCA and report on their findings, including a review of HCA's annual reporting about its own compliance activities. Our Covenant Compliance Committee, which reports to the Board of Directors, meets regularly with the Independent Monitor and reviews HCA's compliance.

We encourage readers to learn more on the Independent Monitor page of our website or by visiting the Independent Monitor's website at [IndependentMonitorMHS.com](https://IndependentMonitorMHS.com).







*We are honored to celebrate the work of our grantees.\**

A Therapist Like Me  
Aaron J. White Foundation  
Abounding Grace Ministry, Inc.  
Addies Chapel United Methodist Church  
African American Heritage Museum of Rutherford County  
AMY Wellness Foundation  
Anchor Baptist Church & Ministries  
Appalachian Mountain Community Health Centers  
Appalachian Sustainable Agriculture Project  
Appalachian Therapeutic Riding Center  
Arc of Buncombe County, Inc.  
Asheville Area Arts Council  
Asheville Buncombe Community Christian Ministry  
Asheville Buncombe Community Land Trust  
Asheville Buncombe Institute of Parity Achievement  
Asheville City Schools Foundation  
Asheville Community Theatre, Inc.  
Asheville Creative Arts  
Asheville Habitat For Humanity  
Asheville Housing Authority  
Asheville Poverty Initiative  
Asheville Writers in the Schools  
Asheville Youth Football and Cheerleading League  
Asheville-Buncombe Technical Community College  
Aura Home Women Vets  
Aurora Studio & Gallery, Inc.  
Avery County Council on Aging/ Volunteer Avery  
Avery County YMCA  
Awake  
Babies Need Bottoms, Inc.  
Bakersville Community Medical Clinic  
Beacon of Hope Services  
Beaverdam Community Development Club  
Beloved Asheville  
Bethel Rural Community Organization, Inc.  
Better Health Together  
Big Brothers & Big Sisters of Western North Carolina  
Big Ivy Community Club

Biltmore United Methodist Church  
Black Mountain Home For Children Youth & Families, Inc.  
Blue Ridge Community College  
Blue Ridge Community Health Services  
Blue Ridge Free Dental Clinic  
Blue Ridge Health - Haywood  
Blue Ridge Health - Henderson  
Blue Ridge Hope  
Blue Ridge Literacy Council  
Blue Ridge Mountains Health Project  
Blue Ridge Parkway Foundation  
Blue Ridge Partnership For Children  
Blue Ridge Public Safety  
Blue Ridge School  
Bluewest Opportunities, Inc.  
Bostic Fire Department  
Bountiful Cities Project  
Bounty & Soul  
Boys & Girls Club of Henderson County  
Boys & Girls Club of Transylvania County  
Boys and Girls Club of the Plateau  
Brasstown Fire Department  
Bread of Life, Inc.  
Brevard College  
Brevard First United Methodist Church  
Bullington Gardens, Inc.  
Buncombe County  
Buncombe County Clerk of Court  
Buncombe County Community Partnerships  
Buncombe County Emergency Management  
Buncombe County Health and Human Services  
Buncombe County Parks & Recreation  
Buncombe County Schools  
Buncombe County Service Foundation  
Buncombe Emergency Operations Center  
Buncombe Partnership for Children  
Burke Council on Alcoholism and Chemical Dependency  
Burke County Emergency Management  
Burke County Schools - FUTURES Program  
Burke County Smart Start  
Burke County United Way  
Burke Emergency Operations Center  
Burke United Christian Ministries  
Burnsville Police Department  
Calvary Episcopal Church  
Caney Fork Community Development Council  
Carolina Day School

Carolina Small Business Development Fund  
Carolina Village, Inc.  
Carson Community Development Association  
Casting Carolinas, Inc.  
Celo Friends Meeting  
Center for Community Self-Help  
Center For Domestic Peace  
Center For Participatory Change  
Centro Comunitario Hispano-Americano  
Centro Unido Latino Americano  
Charles A Cannon Jr. Memorial Hospital, Inc.  
Chase Corner United Methodist Ministries  
Cherokee County  
Cherokee County Cooperative Extension  
Cherokee County Emergency Medical Services  
Cherokee County Fire & Emergency Services  
Cherokee County Food Bank  
Cherokee County Health Department  
Cherokee County Office of the Sheriff  
Cherokee County Public Schools  
Cherokee County Senior Services  
Cherokee County Sharing Center, Inc.  
Cherokee Emergency Management  
Cherokee Fire Marshall  
Cherokee Indian Hospital Authority  
Cherokee REACH  
Cherokee Schools  
Cherokee Senior Services  
Cherokee Sheriff  
Children & Family Resource Center Of Henderson County, Inc.  
Children First Communities In Schools Of Buncombe County, Inc.  
Christine Avery Learning Center  
Christmount Christian Assembly, Inc.  
Circles of Jackson County, Inc.  
City of Asheville  
City of Marion  
City of Morganton  
CityWorks USA  
Clay County  
Clay County Department of Social Services  
Clay County Emergency Medical Services  
Clay County Government  
Clay County Public Health Department  
Clay County Recreation Center & Parks  
Clay County Schools  
Clay County Senior Center  
Clay County Sheriff's Department

Clay REACH  
Cliff's Closet  
Coach's Quest  
Community Action Opportunities  
Community Care Clinic Of Franklin  
Community Care Clinic of Highlands and Cashiers  
Community Foundation of Henderson County  
Community Health Council of Rutherford County  
Community Housing Coalition Of Madison County, Inc.  
Community Table, Inc.  
Compañeros Inmigrantes de las Montañas en Acción  
Comserv, Inc.  
Conflict Resolution Center, Inc.  
Council On Aging of Buncombe County  
Crossnore School & Children's Home  
Cullowhee Kids Preschool  
Davidson River School  
Delta House Life Development Of Asheville, Inc.  
Dig In! Yancey Community Garden  
Eagle Market Street Development Corporation  
Eagle Rock Camp  
East End/Valley Street Neighborhood Association  
Eastern Band of Cherokee Indians  
Eastern Band of Cherokee Indians- Public Health & Human Service Division  
Eblen Charities  
Eliada Homes, Inc.  
Empowerment Resource Center of Asheville and Buncombe County  
Erlanger Health System  
Erlanger Primary Care Peachtree  
Erlanger Western Carolina Hospital  
Family Place Of Transylvania County  
Family Preservation Community Services, Inc.  
Feed-A-Child WNC/Yancey Co  
Feeding Avery Families  
First Baptist Church of Murphy/ Sparrows Nest Food Pantry  
First Contact Ministries, Inc.  
First Presbyterian Church Asheville  
Food Connection, Inc.  
Foothills Harvest Transitional Services, Inc.  
Foothills Health District  
Foothills Industries of McDowell County, Inc.  
Forrest W. Hunt Elementary School  
Free Community Meal and Market  
Friends of PIVOTPoint WNC  
Ft. Hembree Baptist Church  
Full Spectrum Farms, Inc.

Gateway Group of Asheville  
Gateway Wellness Foundation  
General Baptist State Convention of North Caroliina  
Genesis Academy  
Getting Back to the Basics  
Girls on the Run of WNC, Inc.  
Giving Spoon, Inc.  
Grace Extended Ministries, Inc.  
Graham County  
Graham County Department of Social Services  
Graham County Emergency Services  
Graham County EOC  
Graham County Health Department  
Graham County Public Schools  
Graham County Recreation Department  
Graham County Transit  
Graham Revitalization Economic Action Team - Great  
Graham Senior Center  
Grahamtown Team  
Greater New Zion Baptist Church  
Greater Works Church of God in Christ  
Green Built Alliance  
Green Opportunities  
Grove Church  
Habitat For Humanity Avery County  
Hands On! A Child's Gallery  
Hatch Avl Foundation  
Haywood Blue Ridge Health  
Haywood Christian Ministry  
Haywood Community College  
Haywood County  
Haywood County Health Department  
Haywood County Health and Human Services  
Haywood County Schools  
Haywood Pathways Center  
Haywood PHSD  
Haywood Street Congregation  
Helpmate  
Henderson Advent Health  
Henderson County  
Henderson County Education Foundation, Inc.  
Henderson County Emergency Medical Services  
Henderson County Free Medical Clinic, Inc.  
Henderson County Habitat for Humanity  
Henderson County Hunger Coalition  
Henderson County Public Schools  
Henderson County Sheriff's Office  
Henderson County Young Leaders dba Camplify  
Henderson County Sheriff's Department

Hendersonville Fire Department  
Hendersonville Police Department  
Hendersonville Rescue Mission  
HERE in Jackson County, Inc.  
Hickory Nut Gorge Outreach, Inc.  
High Country United Way  
Higher Academia  
Highlands-Cashiers Health Foundation  
HIGHTS  
Hinton Rural Life Center  
Hola Carolina  
Holly Springs Community Development Club, Inc.  
Home Advocates And Limitless Outreach  
Homeward Bound Of Western North Carolina, Inc.  
Hope For Abuse Victims Through Education And Nurturing-Haven  
Hospice & Palliative Care Of The Blue Ridge, Inc.  
Hospice Of Yancey County, Inc. dba Compassionate Care Western NC  
Hot Springs Health Program  
House Of Refuge Ministries  
Housing Assistance Corporation  
Housing Authority of the City of Asheville  
Hunger and Health Coalition  
Hurlburt-Johnson Friendship House, Inc.  
Impact Church  
Industrial Opportunities  
Institute for Prevention Healthcare and Advocacy  
Interdenominational Ministerial Alliance Ministries  
Interfaith Assistance Ministry, Inc.  
International Friendship Center  
INTO LIGHT  
Irene Wortham Center, Inc.  
Isothermal Community College  
Isothermal Planning & Development Commission  
Jackson County  
Jackson County Department of Public Health  
Jackson County Department of Social Services  
Jackson County Department on Aging  
Jackson County Tax Collector  
Jackson EMS  
Jackson HERE Homeless Shelter  
Jewish Community Center Of Asheville, Inc.  
Jewish Family Services of WNC  
John Scarlett Memorial Foundation, dba Rotary Club of Brevard, NC Foundation





Jones Temple African Methodist Episcopal Zion Church  
Jordan Peer Recovery  
Just Economics  
KL Training Solutions  
Land of Sky Regional Council  
Land of the Sky United Church of Christ  
Latino Advocacy Coalition  
LEAF Global Arts  
Ledford's Chapel United Methodist Church  
Lees-Mcrae College, Inc.  
Lenoir-Rhyne University  
Liberty Baptist Church  
Liberty Corner Enterprises, Inc.  
Liberty Mission Baptist Church  
Life 107 Ministries, Inc.  
Light a Path  
Loving Food Resources  
Macon County  
Macon County Care Network  
Macon County EMS  
Macon County Heritage Center  
Macon County Schools  
Macon County Senior Services  
Macon County Sheriff's Office  
Macon County Transit  
Macon Program For Progress Inc  
Macon REACH  
Macon Senior Services  
Macon STEM Program  
Madison County  
Madison County DSS  
Madison County Education Foundation, Inc.  
Madison County Emergency Management  
Madison County Fire Department  
Madison County Health Department  
Madison County Partnership for Children & Families  
Madison County Sheriff's Department  
MANNA FoodBank  
Mars Hill Police Department  
Mars Hill University  
Martin Luther King Jr. Association of Asheville & Buncombe County  
Mary B. Mullen Bible Camp  
Masks of Love  
Matt's Ministry, a mission of Ledford's Chapel United Methodist Church  
Mayland Community College Enterprise Corporation  
McDowell County  
McDowell County EMS  
McDowell County EOC  
McDowell County Head Start

McDowell County Health Coalition, Inc.  
McDowell County Schools  
McDowell County Senior Center  
McDowell LFAC  
McDowell Mission Ministries, Inc.  
McDowell Technical Community College  
Meals On Wheels of Asheville and Buncombe County, Inc.  
Meals on Wheels of Brevard  
Meeting Place Mission  
Memorycare  
Mercy Urgent Care  
Mitchell Community Health Partnership  
Mitchell County  
Mitchell County SafePlace  
Mitchell County Schools  
Mitchell Senior Center  
Mitchell-Yancey Habitat For Humanity  
Montreat College  
Morning Star Missionary Baptist Church  
Mount Zion Community Development, Inc.  
Mountain Area Health Education Center  
Mountain Area Residential Facilities, Inc.  
Mountain BizWorks  
Mountain Community Health Partnership  
Mountain Housing Opportunities, Inc.  
Mountain Projects, Inc.  
Mt. Olive Missionary Baptist Church  
Mud Creek Missionary Baptist Association  
Muddy Sneakers, Inc.  
Murphy Police Department  
My Daddy Taught Me That  
My Sister's Place, Inc.  
My Sister's Place of Madison  
Nantahala Health Foundation  
Nantahala Regional Library  
National Black MBA Association  
Neighbors Feeding Neighbors Food Ministry  
Neighbors in Ministry  
New Bethel Missionary Baptist Church  
New French Broad Baptist Church  
New HOPE Of McDowell  
No Wrong Door for Support and Recovery  
North Carolina Breastfeeding Coalition  
North Carolina Society of Hispanic Professionals

North Carolina State University  
North Transylvania Fire Rescue, Inc.  
Northwestern Housing Enterprises  
One Dozen Who Care  
One Youth at a Time  
Only Hope WNC  
OnTrack Financial Education & Counseling  
Open Hearts Art Center  
OpenDoors Of Asheville  
Our Voice, Inc.  
Out Of The Ashes Ministry  
Pardee Adult and Family Medicine  
Pardee Hospital Foundation  
Partners Unlimited  
Partnership for Children of the Foothills  
Peak Academy Charter School  
Penland School Of Craft  
Pigeon Community Development Club  
Pisgah Health Foundation  
Pisgah Legal Services  
Polk County  
Polk County Council On Aging, Inc.  
Polk County Emergency Management  
Polk County EMS  
Polk County Health Department  
Polk County Schools  
Positive Changes Youth Ministries  
Qualla Home Health  
Qualla SAFE  
Rainbow Community School  
REACH of Cherokee County  
Reach Of Clay County, Inc.  
Reaching Avery Ministry  
Region A Partnership For Children  
Region D Council of Governments  
Resources For Resilience  
Restoration House  
RHA Behavioral Health Services, LLC  
River Front Development Group  
Riverlink, Inc.  
Robbinsville United Methodist Church  
Rock Baptist Church  
Rock Bottom Recovery and Support, Inc.  
Rolling Start NC  
Roseland Community Center  
Rutherford Building Agricultural Relationships Now, Inc.  
Rutherford County  
Rutherford County Habitat for Humanity, Inc.  
Rutherford County Schools  
Rutherford County Schools Education Foundation  
Rutherford County Senior Center

Rutherford Housing Partnership, Inc.  
Rutherford Outdoor Coalition  
Saint James Episcopal Church  
Salvation Army  
SEARCH  
SeekHealing  
Senior Care Group, Inc.  
Shepherd's Staff  
Shiloh Community Association  
Shooting Creek Volunteer Fire Department  
Sisters of Mercy Urgent Care  
Sixth Avenue Psychiatric Rehabilitation Partners, Inc.  
Smart Start of Transylvania County  
Smart Start Partnership For Children  
Southern Reconciliation Ministries, Inc.  
Southwestern Child Development Commission  
Southwestern Commission  
Southwestern Community College  
Sparc Foundation, Inc.  
Speak Life Community Church  
Spring Creek Community Center  
Spruce Pine Montessori School, Inc.  
St. Gerard House  
St. John Baptist Church  
St. Luke CME Church  
St. Luke's Hospital, Inc.  
St. Paul's Episcopal Church  
State of Franklin Health Council, Inc.  
State of Franklin Senior Services  
Steady Collective, Inc.  
Stecoah Township Rescue Squad and Fire Department, Inc.  
Stecoah Valley Arts, Crafts & Educational Center, Inc.  
Streets To Grace  
Summit Charter School, Inc.  
Sunrise Community For Recovery & Wellness  
Swain County  
Swain County Caring Corner  
Swain County Department of Social Services  
Swain County EMS  
Swain County Family Resource Center  
Swain County Health Department  
Swain County Public Schools  
Swain-Qualla Safe, Inc.  
Swannanoa Valley Child Care Council, Inc.  
Tabernacle Missionary Baptist Church  
Teen Challenge Of The Smokies, Inc.  
The Center for Native Health  
The Council on Aging for Henderson County  
The EACH Initiative, Inc

The Enola Group Inc  
The Episcopal Church of the Holy Spirit  
The Free Clinics  
The Haven of Transylvania County  
The Health Initiative  
The Literacy Council Of Buncombe County  
The Original Thomas Chapel AME Zion Church Restoration Corp  
The Outreach Center  
The Source Ministry  
The Still Place Inc  
The Thirtieth Judicial District  
Domestic Violence-Sexual Assault Alliance, Inc.  
Thermal Belt Outreach Ministry  
Tipton Hill Community Foundation  
Toe River Health District  
Town of Crossnore  
Town of Forest City  
Town of Murphy  
Town of Rutherfordton  
Transylvania Association For Disabled Citizens, Inc.  
Transylvania Christian Ministries  
Transylvania Community Arts Council  
Transylvania County  
Transylvania County Department of Social Services  
Transylvania County EMS  
Transylvania County Public Health  
Transylvania County Schools  
Transylvania County Schools Educational Foundation, Inc.  
Transylvania County Sheriff's Department  
Transylvania Disabled Citizens  
Transylvania Farmers Market  
Transylvania Fire Rescue  
Transylvania Vocational Services, Inc.  
Trauma Intervention Program of Western North Carolina  
Tri County Community College  
Tried Stone Missionary Baptist Church  
True Ridge  
Tryon Seventh-Day Adventist Church  
Umoja Health, Wellness and Justice Collective  
Union Grove Baptist Church  
United Christian Ministries of Jackson County  
United Community Development of North Carolina  
United Way of Asheville & Buncombe County  
United Way of Cherokee and Clay Counties  
United Way of Haywood County

United Way of Henderson County  
United Way Of Rutherford County, Inc.  
Unity In The Community  
University of North Carolina at Asheville Foundation, Inc.  
Vaya Health  
Vecinos  
Vocational Solution of Henderson County  
Walnut Creek Community Club Inc  
WAMY Community Action, Inc.  
Warren Wilson College  
Waynesville Missionary Baptist Association  
Webster Enterprises of Jackson County, Inc.  
West Marion Community Forum, Inc.  
Western Carolina Community Action, Inc.  
Western Carolina Medical Society Foundation  
Western Carolina Pacesetters  
Western Carolina Rescue Ministries  
Western Carolina University  
Western NC Housing Partnership  
Western North Carolina AIDS Project, Inc.  
Western North Carolina Region Education Service Alliance  
Western North Carolina Superheros, Inc.  
Western North Carolina Workers Center  
Western Piedmont Community College  
Western Piedmont Council of Governments  
Williams YMCA of Avery County  
WNC Bridge Foundation  
WNC Communities  
WNC Health Network  
WNC Nonprofit Pathways  
WNC Workers Center  
Working Wheels  
Yancey County  
Yancey County Economic Development Commission  
Yancey County Emergency Management/911  
Yancey County Schools  
Yancey County Sheriff's Department  
YMCA of Avery County  
YMI Cultural Center  
Young Mens Christian Association of Western North Carolina  
Youth Outright WNC  
Youth Villages of NC  
YTL Training Programs  
YWCA of Asheville and Buncombe County

\*Grantee list as of 12/16/2020



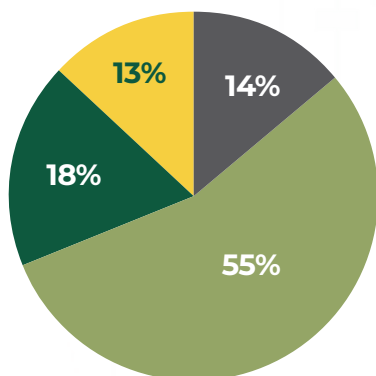
# BOLD Numbers 2019

## Financial Snapshot

### STATEMENT OF CASH FLOWS

FOR THE  
YEAR ENDED  
DECEMBER 31, 2019

### ASSET ALLOCATION



- Cash/Fixed income
- Equities
- Diversifiers
- Private Investments

### CASH FLOWS FROM OPERATING ACTIVITIES

Change in net assets	1,098,218,176
<b>Adjustments to reconcile change in net assets to net cash provided by operating activities:</b>	
Contribution revenue - investments	(938,277,461)
Contribution revenue - furniture, fixtures, & equipment	(207,750)
Depreciation expense	30,198
Amortization of ROU asset	143,113
Unrealized appreciation on assets	(51,577,444)
<b>Changes in operating assets and liabilities</b>	
Sales tax receivables	(69,652)
Other assets	(420,756)
Grants payable	365,000
Accounts payable	1,107,682
Other liabilities	179,414

Net cash provided by operating activities.....\$109,490,520

### CASH FLOWS FROM INVESTING ACTIVITIES

Purchases of furniture, fixtures, and equipment	(3,804)
Maturities of investments	193,494,920
Purchases of investments	(296,259,456)

Net cash used in investing activities.....(\$102,768,340)

Net increase in cash	6,722,180
Cash, beginning of year	-
Cash, end of year	\$6,722,180

### STATEMENT OF FINANCIAL POSITION

DECEMBER 31, 2019

### ASSETS

Cash & cash equivalents	6,722,180
Sales tax receivables	69,652
Investments, at fair value	1,092,619,441
Fixed assets	181,356
Other assets	277,643

Total assets.....\$1,099,870,272

### LIABILITIES & NET ASSETS

#### Liabilities:

Grants payable	365,000
Accounts payable	1,107,682
Other liabilities	179,414
<b>Total liabilities</b>	<b>\$1,652,096</b>

**Net assets without donor restrictions**.....1,098,218,176

Total liabilities and net assets.....\$1,099,870,272

### STATEMENT OF ACTIVITIES

FOR THE  
YEAR ENDED  
DECEMBER 31, 2019

### REVENUES

Contributions received	1,053,052,882
Investment returns, net	50,851,894

Total revenues.....\$1,103,904,776

### EXPENSES

Compensation and benefits	2,377,394
Professional fees	2,084,772
Other expenses	859,434

Total expenses.....\$5,321,600

### GRANTS APPROVED

Grants approved	365,000
-----------------	---------

Total grants approved.....\$365,000

Change in net assets.....\$1,098,218,176

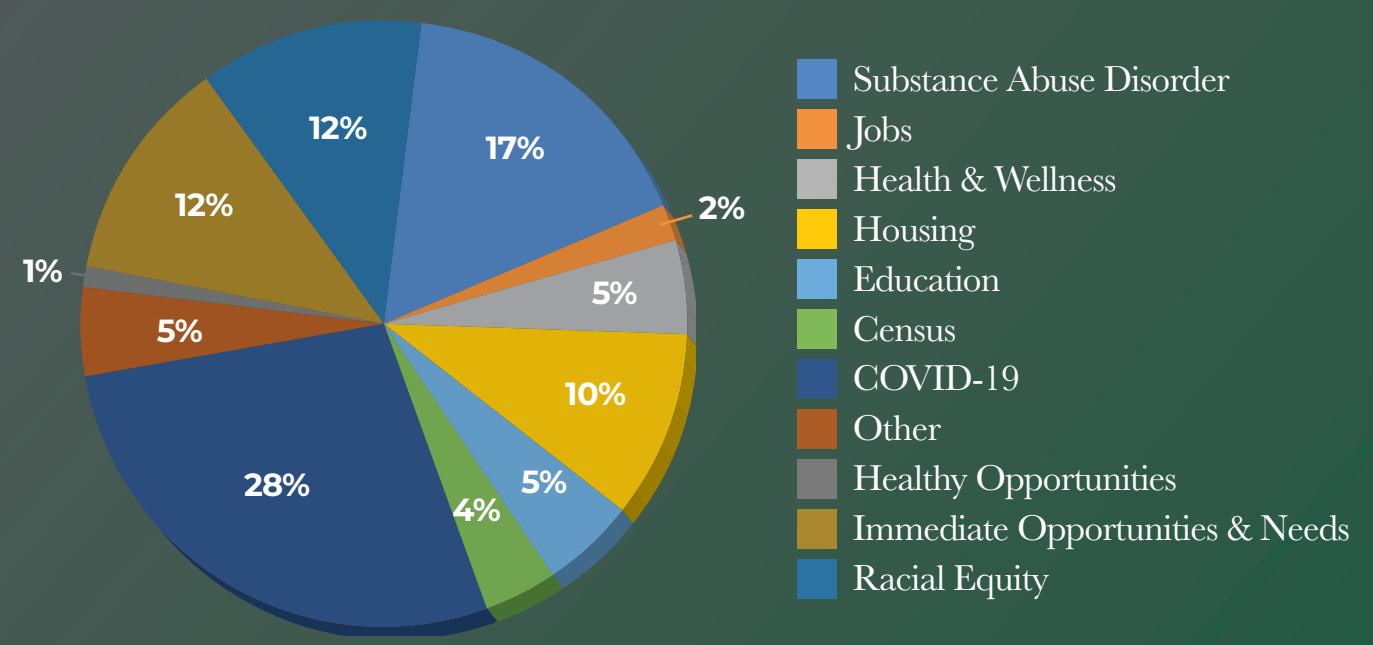
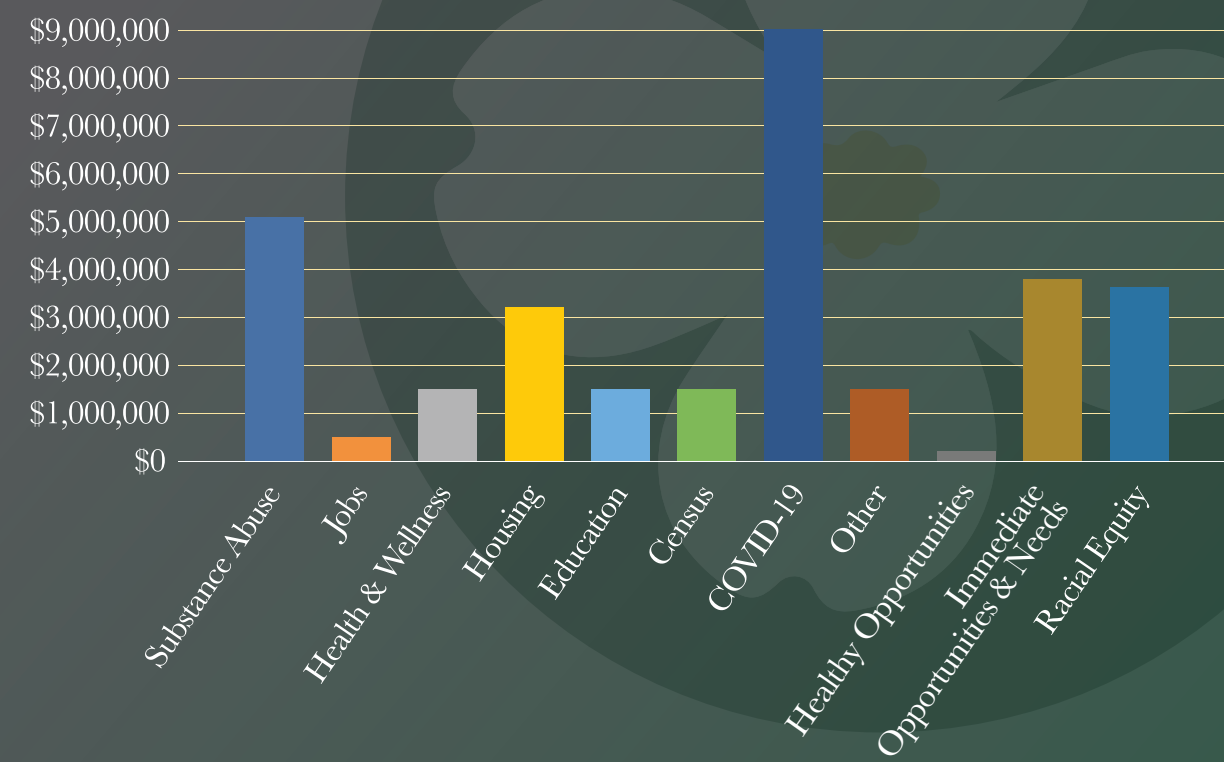
Net assets at beginning of year.....-

Net assets at end of year.....\$1,098,218,176





# 2020 Grants



## BOARD OF Directors

We seek leadership that reflects all aspects of the communities we serve. Our volunteer board encompasses not only diversity of race, ethnicity, gender, and geography, but also a diversity of lived experiences and expertise. During the past year, our board has engaged intentionally and thoughtfully in a number of challenging conversations, from how to fight the scourge of COVID-19 to how to become an effective and dedicated partner in the work of addressing the history of racial disparity in our region. Through thousands of unpaid hours of extensive learning, analysis, and hard work, our Board of Directors set the policies and made the decisions that have allowed Dogwood to enter boldly into the work of dramatically improving health and well-being.

**Janice W. Brumit**, Board Chair,  
Governance and Compensation  
Committee Chair (Buncombe  
County)

**John F.A.V. "Jack" Cecil**, Vice Chair,  
Nominating Committee Chair  
(Buncombe County)

**George D. Renfro**, Secretary/  
Treasurer, Investment Committee  
and Impact Investing Chair  
(Buncombe County)

**John R. Ball, M.D., J.D.**, Covenant  
Compliance Committee Chair  
(Buncombe County)

**Vivian A. Bolaños**, Finance  
Committee Chair (Henderson  
County)

**Casey Cooper** (Qualla Boundary)  
**Jaqueline L. Godlock** (Rutherford  
County)

**Dawna D. Goode-Ledbetter**  
(McDowell County)

**Samuel D. Lupas**, Audit Committee  
Chair (Jackson County)

**Jacquelyn S. Simms**, Program  
and Grants Committee Chair  
(Buncombe County)

**Sarah Thompson** (Jackson County)

**Donna Tipton-Rogers, Ed.D** (Clay  
County)

**Martha C. Tyner** (Yancey County)

### NON-BOARD COMMITTEE MEMBERS

One of our commitments to the region is to include at least six non-board members on three specific board committees. We exceeded that commitment in 2020 and are grateful for the time and attention each of the following individuals has dedicated to our work.

### PROGRAMS AND GRANTS

**Suzanne Landis, M.D.**, Buncombe County  
**Brian Mitchell, M.D.**, Clay County  
**Dwight Mullen, Ph.D.**, Buncombe County  
**April Ross**, Swain County

### NOMINATING

**Rt. Rev. José McLoughlin**, Henderson County  
**Harris Prevost**, Avery County

### COVENANT COMPLIANCE

**Richard Houck**, Transylvania County  
**Annette Staley**, Rutherford County

In addition, we thank the non-board members of our Investment Committee who volunteer their time in service to the region. They all reside in Buncombe County.

**Robert Chandler**  
**Scott Hickman**  
**Lyle Johnson**  
**Tom Maher**  
**Jim Mathews**  
**Nathan Renfro**  
**Kent Stahl**  
**Henry Wilkinson**







**DOGWOOD**  
HEALTH TRUST

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