

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.

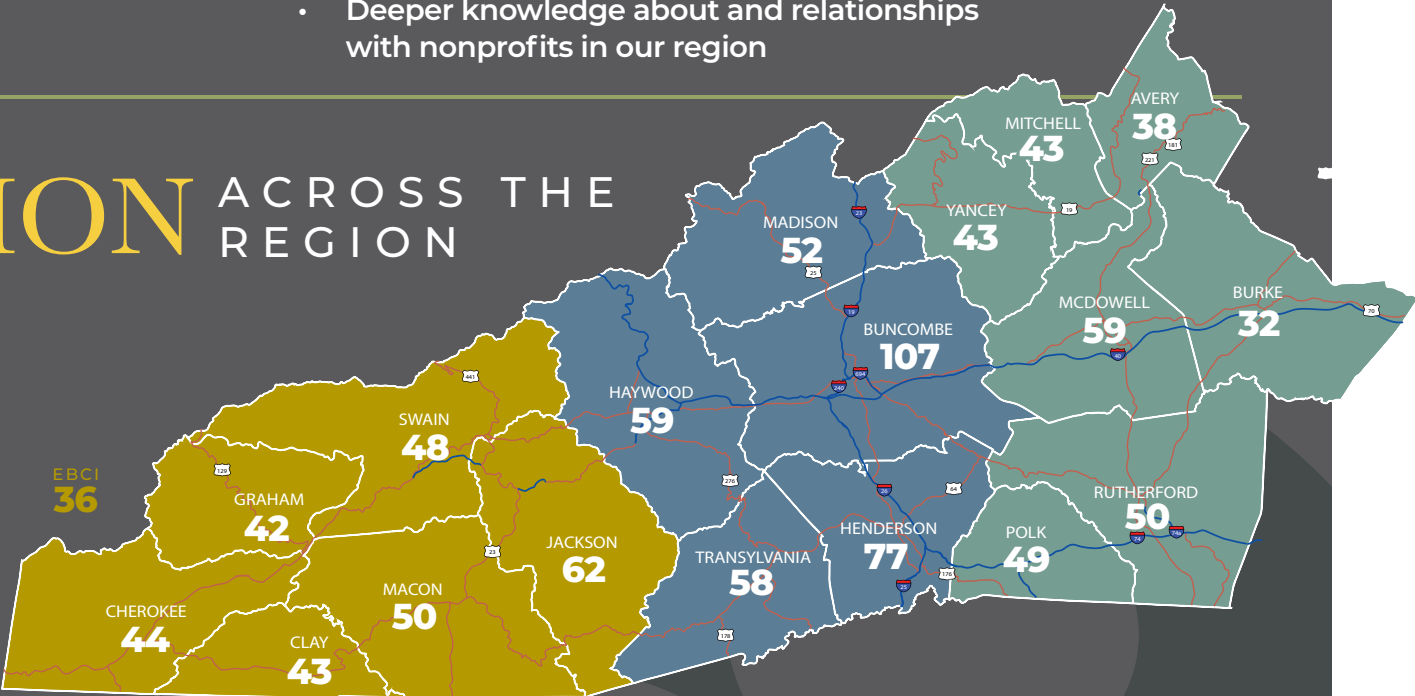
Strategy: Offer grants of \$500 to \$25,000 to organizations through a simple, online application process.

Grants approved: \$3.78 million in awarded grants

Outcomes:

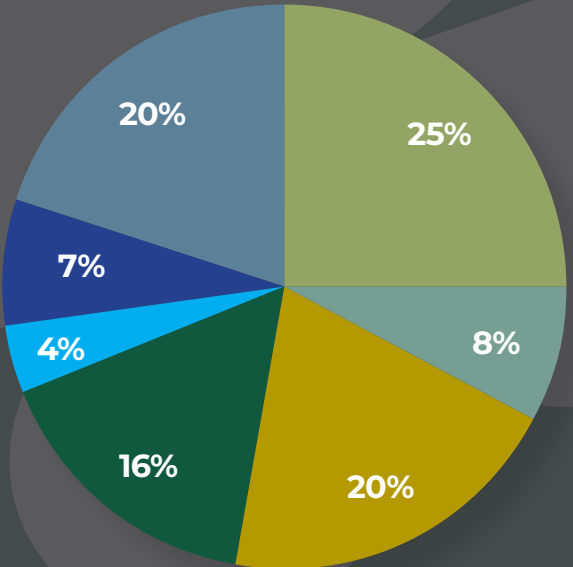
- 492 applicants
- 259 awards
- \$14,600 average grant size
- Deeper knowledge about and relationships with nonprofits in our region

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.

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

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**

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

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

LEARN

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





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.

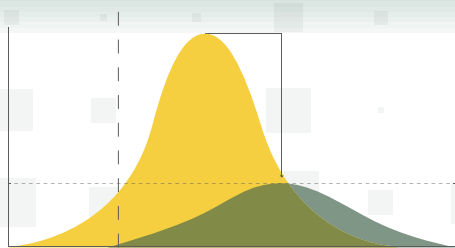
- **Rev. Eric Reece**, Robbinsville United Methodist Church



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



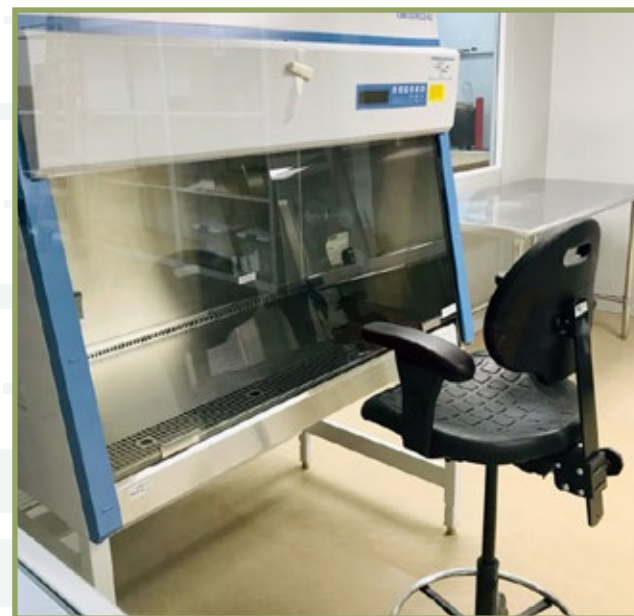
BOLD Action

Impact Investing

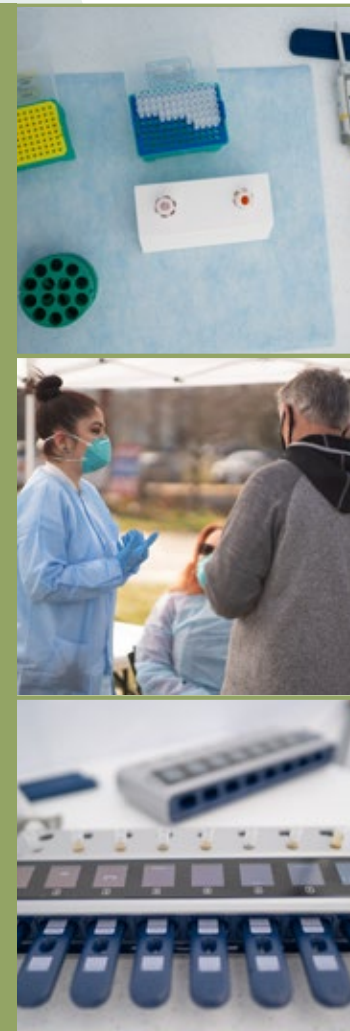
While the pandemic has caused significant economic hardship in WNC, it has also opened the door to economic opportunities. As a private foundation, Dogwood can do more than make grants. We can also use our assets to help other organizations acquire access to capital – which they can then use to create 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.





*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

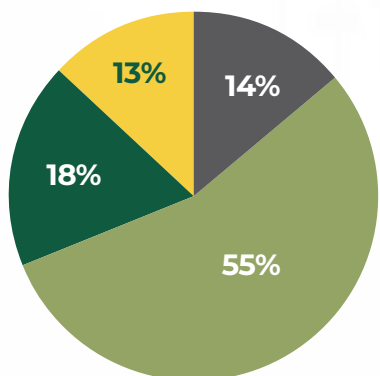
BOLD Numbers 2019

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
Adjustments to reconcile change in net assets to net cash provided by operating activities:	
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)
Changes in operating assets and liabilities	
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
Total liabilities	\$1,652,096

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

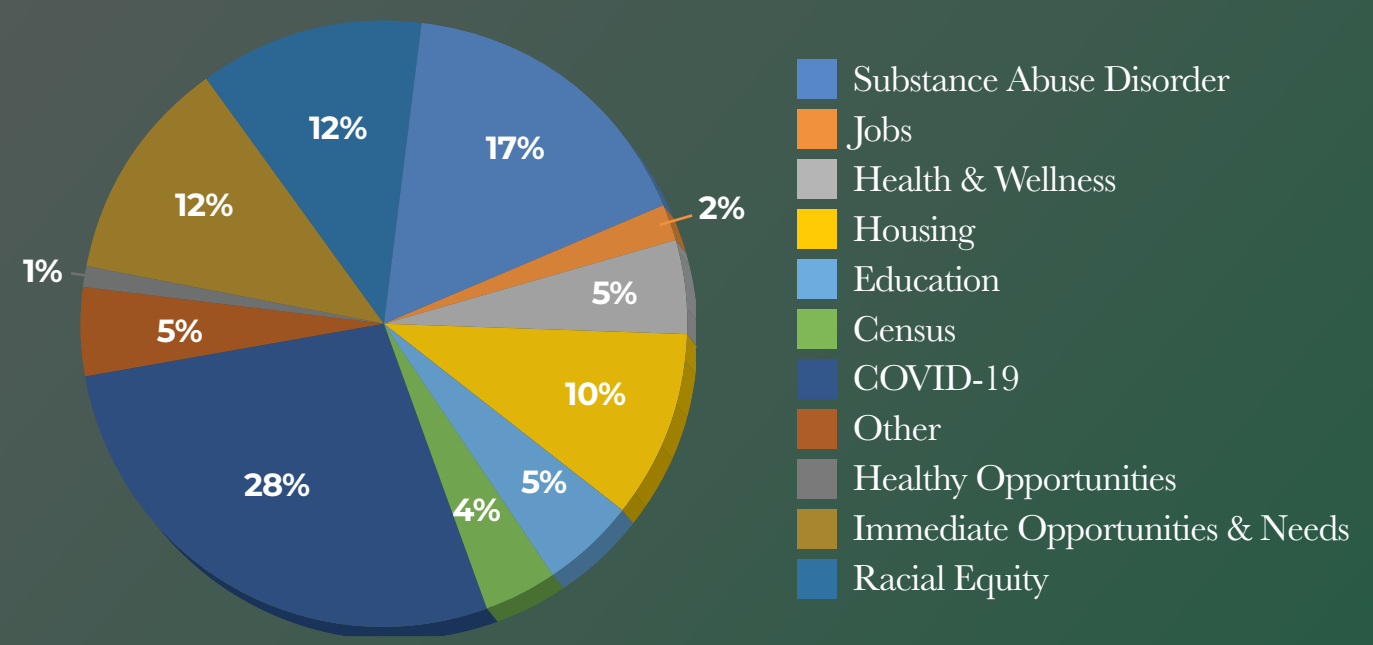
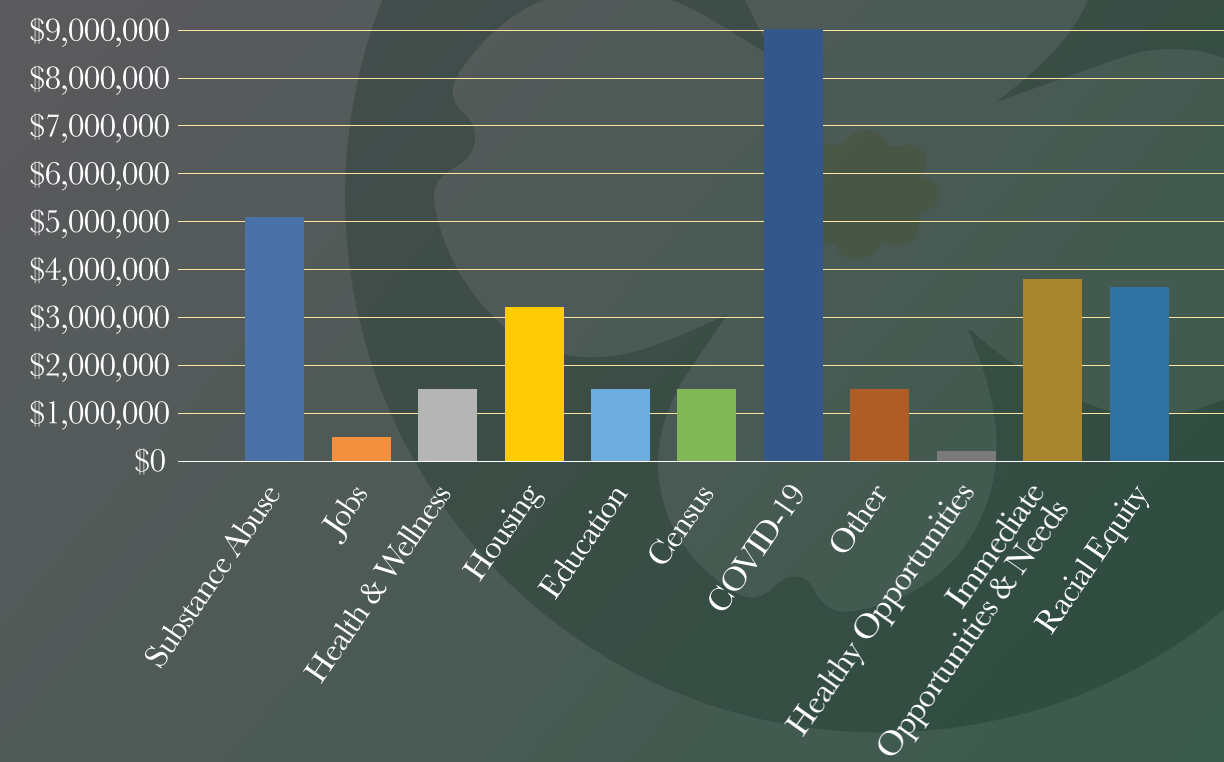
Change in net assets.....\$1,098,218,176

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, Polk 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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