

Dr. Susan R. Mims, chief executive officer

John F. A. V. Cecil, chair, board of directors



## our work

Dogwood Health Trust exists to dramatically improve the health and wellbeing of all people and communities in the 18 counties and Qualla Boundary of Western North Carolina. We work within our communities, collaborating with grantees, partners, researchers, policymakers, advocates and scholars – those closest to the communities we serve – to create a Western North Carolina where every generation can

## live, learn, earn & thrive, with dignity and opportunity for all — no exceptions.





#### **Dogwood's Community Investment Philosophy**

shapes our approach to our work through two fundamental anchoring principles: we are community-focused in all we do, and we view equity as a means and an end for our work. Our commitment to these foundational principles fuels our efforts to make the place we call home healthier, stronger, more inclusive, better educated, economically stable and more resilient today and for future generations.

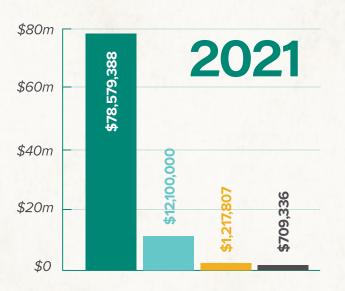


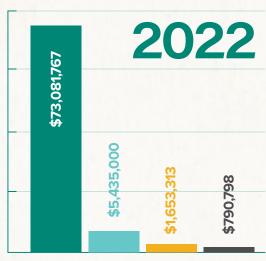


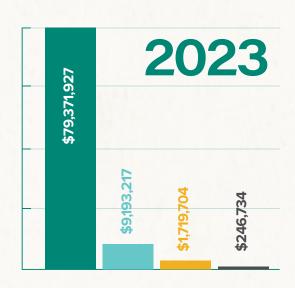
## lestiments

# total invested in community









# 2023 grantmaking by priority area

In 2023, Dogwood Health Trust approved \$92.7 million in new grants, some of which will be paid in future years. More than \$79.3 million was distributed through 545 grants, some of which were approved in previous years. A full list of grants by county is available on pages 23-36.

| strategy area        | grants paid  | new commitments |
|----------------------|--------------|-----------------|
| Community Equity     | \$6,502,413  | \$6,533,444     |
| Economic Opportunity | \$16,263,490 | \$20,849,997    |
| Education            | \$19,020,516 | \$30,265,427    |
| Health & Wellness    | \$24,670,650 | \$24,902,618    |
| Housing              | \$12,914,858 | \$10,225,466    |
| grand total          | \$79,371,927 | \$92,776,952    |







## our partner stories

We believe that the people working to overcome their communities' challenges are best equipped to develop solutions that work. Dogwood is committed to co-investing in the knowledge, assets, dreams and plans of our partners.

This year, we worked with hundreds of organizations, synthesizing solutions to make the place we call home more economically stable and inclusive, better housed and educated and overall stronger and healthier – today and for future generations.















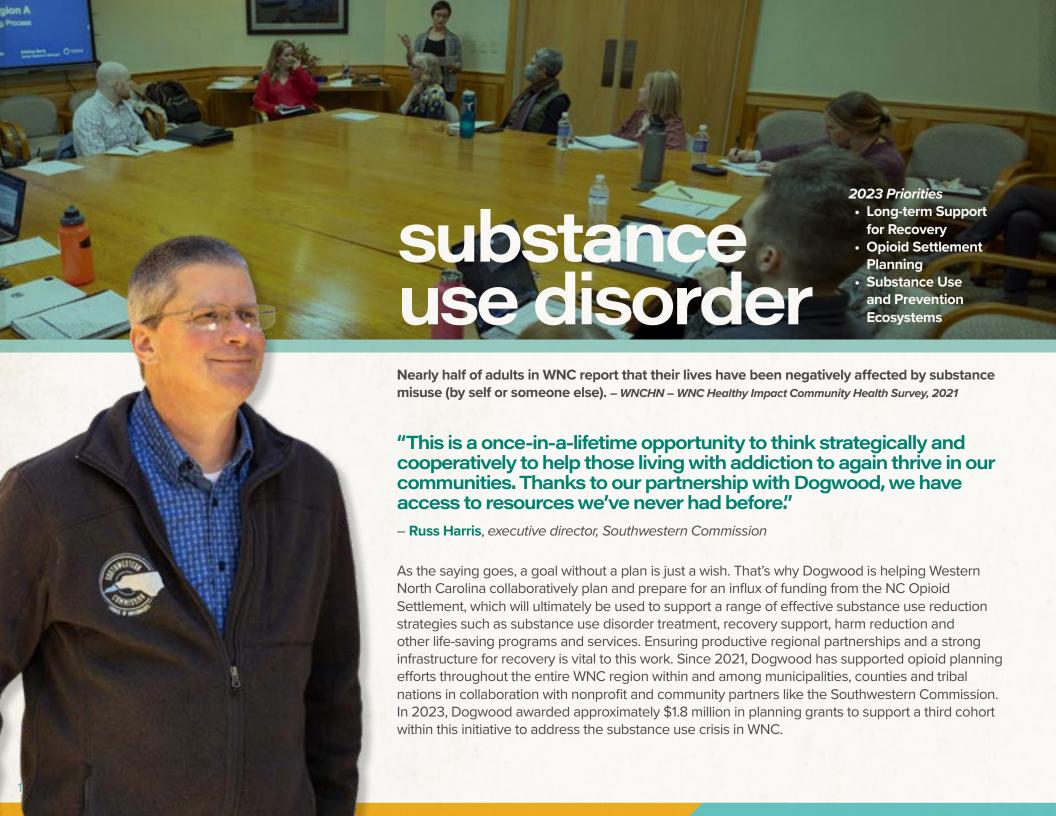


Everyone deserves to be healthy, regardless of their circumstances. We strive to expand access to care, improve care quality and support upstream interventions that improve health outcomes for all people.

"With the increased availability of services and wise coordination, I see our mountain communities being able to effectively combat poverty and trauma, enhancing the probabilities for families to have healthier, more productive and longer lives."

Judge Rebecca Eggers-Gryder, district court judge, NC 24th Judicial District

When families are in crisis, every second counts – especially for young children. Dogwood provided a \$1 million investment in an evidence-based model in Mitchell and Yancey counties in Judicial District 24 that helps young children involved in the child welfare system transition more quickly from foster care to a safe and permanent home. The Safe Babies Court Team (SBCT) pilot provides professionals to help facilitate family decision-making and enhance communications with the courts, resulting in timely dispositions for children. Teams also connect families and children with services and programs with a focus on healthy child development. This SBCT pilot addresses larger service gaps and systemic barriers for families and is among five other pilots supported by the NC Administrative Office of the Courts, NC Department of Health and Human Services and other philanthropic organizations.



## impact investments

To create long-term positive change in Western North Carolina, Dogwood complements its traditional grantmaking through direct capital investments. Since its inception, Dogwood has used tools known as Program Related Investments (PRI) and Mission Related Investments (MRI) to support more than \$89 million in projects throughout the region. These investments focus on community impact rather than financial return and align with Dogwood's purpose of improving health and wellbeing by addressing the social determinants of health.

In 2023, more than \$9 million in investments provided support for the creation of affordable housing, improved access to health care and greater access to healthy foods.

#### **Investment Partner Impacts in 2023**

- Construction of a new Federally Qualified Health Center, increasing access to health care for over 4,000 WNC residents.
- A new home for a food hub connecting families to farmers for locally grown healthy foods, providing increased revenue to farmers and improved nutrition for families.
- The creation of a new affordable housing development benefiting 33 new homeowners.



## beyond grantmaking

In addition to grantmaking throughout the region,
Dogwood also provides other support to our
communities. Whether learning together to advance
common goals or partnering to increase sustainability,
we seek the perspectives of partners and those with
lived experience to help us better understand how
to dramatically improve the health and wellbeing of all
people and communities in Western North Carolina – no
exceptions.







## gathering

Steadfast connection and continuous learning are essential to achieving our purpose. At our second annual Convening held at Western Carolina University in October 2023, more than 350 of our partners gathered to reflect on what we learned through our collective work and to see the possibilities for our future work together. This Convening has grown and includes more time for attendees to connect, learn from each other and network across sectors and geographies.





Click or scan to view our See Possibilities 2023 Convening video.





## learning

While learning helps us better understand the needs of our region, it also illuminates next steps that fuel progress toward our goal of generational change. In 2023 we commissioned priority-specific reports and studies to establish clear baselines within several of our strategic areas. We also examined trends and data from expert sources. Through both numbers and stories, these data show where we are now and allow us to see the possibilities ahead.

### reports

Dogwood released the following four commissioned reports in 2023 to support and inform our priorities, partnerships and investments.

### webinars

As part of our ongoing commitment to learning, Dogwood hosted webinars featuring the research experts from each commissioned study. More than 500 people attended these Community Investment webinars, and each report sparked additional conversations within groups across the region.

Additionally, **Dogwood's Next-Level Funding Webinar Series** (dogwoodhealthtrust.org/beyond-grantmaking/next-level-funding) offered monthly gatherings for organizations to learn how to take their fundraising to the next level, increase grant support and diversify revenue streams.

Nearly 700 individuals connected and learned through 12 Next-Level Funding Webinars in 2023.



## Summer Learning Recovery in Western North Carolina: Voices From the Field

A study that captures "the voices behind the numbers" to better understand summer learning recovery efforts in high schools in Western North Carolina.



#### Care and Learning Initiative (CandL) Listening Session Analysis (Western Counties)

An analysis of feedback collected from parents and early childhood education providers about the barriers to early care and education across 13 counties in Western North Carolina.



## WNC After 3PM: A Landscape Analysis of Out-of-School Time (OST) Programs in the 18 Westernmost NC Counties and the Qualla Boundary

Results from an online survey of 83 OST providers operating more than 134 different programs, examining the locations and characteristics of OST programs in Western North Carolina.



## Economic Impacts of Canton Paper Mill Closure in WNC

This analysis offers insights about how the mill's closing will affect the 18-county Western North Carolina economy.

# supporting our partners

A healthy and sustainable nonprofit infrastructure is critical for the future of Western North Carolina. Dogwood's Sustainable Organizations focus is one element of our work in Community Equity, supporting organizations to do their best work through capacity-building initiatives and grant writing support.

## capacity building

As Dogwood moves into its fifth year, we've learned through experience that we can't simply grant our way out of the obstacles we face – our region also needs strong nonprofit organizations led by resourced, connected and empowered leaders. Increasingly, Dogwood is expanding capacity-building support for funded partners, so that they can be more effective in their work.

To accomplish this, Dogwood joined the WNC Nonprofit Pathways Funders Collaborative along with the Community Foundation of Western North Carolina, WNC Bridge Foundation, United Way of Asheville and Buncombe County, and Cherokee Preservation Foundation to underwrite programs that build organizational strength and effectiveness and ensure accessibility for regional nonprofits at low or no cost.

Last year, Dogwood also launched a pilot program with WNC Pathways, providing capacity-building support to selected, strategically aligned partners. Through workshops, training and coaching, grantees learned about nonprofit fundamentals, leadership, adaptive capacity, management and operations. Partners also received funding to engage a consultant of their choice to do deeper work on a project that advances their mission, in addition to general operating support.

"Together, we're equipping leaders and organizations to thrive and, most importantly, drive transformative change in our communities." – Jeannette Butterworth, WNC Nonprofit Pathways

## leveraging resources

Dogwood's Leverage Fund provides connections to and funding for professional grant writers on behalf of organizations interested in pursuing state, federal and national funding. In 2023, the Leverage Fund awarded \$1.1 million in grants to 80 partners and provided \$246,734 in grant-writing assistance, enabling organizations to benefit from veteran grant writers.

#### These efforts resulted in more than \$81 million in funding from outside of our region to these partners.

As a small, new nonprofit working to address social, economic, educational and cultural inequities in Jackson and Graham Counties, Unidxs WNC actively engages and supports the Hispanic and Latino community – but faced a challenge in engaging the support of foundation funders. Unidxs was propelled forward by Dogwood's Leverage Fund, which provided assistance from a seasoned, Spanish-speaking grant writer who helped Unidxs secure a \$50,000 grant from another external foundation. Not only did this financial boost provide vital assistance, but it also gave the organization newfound credibility, opening doors to exciting collaborations and partnerships with other influential foundations.

"This is our very first grant, and we are so excited to use these funds to do more for the underserved Latinx communities in Jackson and Graham counties. I'm very happy for the help we received from the Leverage Fund." – Ricardo Bello Ball, executive director, Unidxs

## informing public policy

Imagine the possibilities in a region where public policies align seamlessly with public services. By supporting organizations that advocate for policies that align with Dogwood's strategic priorities, Dogwood launched a formalized policy and advocacy body of work in 2023. This entailed participating in funders' collaboratives and joining other foundations in co-funding statewide advocacy work impacting Western North Carolina.

Dogwood also made its first policy and advocacy grants in 2023 to four nonprofit advocacy partners, setting the stage for new and growing opportunities in the future that center the voices and perspectives of people and communities in WNC. One such grant-funded Medicaid expansion implementation increased access to preventative care and lowered medical debt across our region.

## board of directors

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Chair-Governance & Compensation
Committee
Ex-officio member of all committees

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Vice Chair-Governance &
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Community Investment Committee
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Chair-Audit & Finance Committee
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Community Investment Committee Investment Committee

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**Buncombe County** 

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Community Investment Committee Investment Committee

Clay County

#### **Martha Tyner**

Community Investment Committee Covenant Compliance Committee **Yancey County** 

Membership as of January 1, 2024

## non-board committee service

Community Investment Committee

Dwight Mullen Annette Staley

Covenant Compliance Committee

John Ball David C. Joyce

Investment Committee

Robert Chandler W. Scott Hickman Karen LeVert Thomas Maher James Mathews Nathan Renfro Henry Wilkinson

#### **Avery County**

#### **Avery County**

\$25,000 Health & Wellness

\$350,000 Housing

\$300,000 Behavioral Health & Substance Use Disorder

\$75,000 Health & Wellness

### Avery County Schools

\$112,500 Education

\$112,500 Economic Opportunity

#### Avery Senior Services

\$27,000 Health & Wellness

#### High Country Community Health

\$150,000 Behavioral Health & Substance Use Disorder

\$50,000 Health & Wellness

#### The Crossnore School & Childrens Home

\$374,000 Health & Wellness

#### Young Mens Christian Association of Avery County Inc

\$50,000 Health & Wellness

\$75,000 Health & Wellness

\$222,052 Education

#### **Buncombe County**

#### Appalachian Mountain Community Health Centers

\$70,197 Health & Wellness

\$40,000 Health & Wellness

\$85,800 Behavioral Health & Substance Use Disorder

\$50,000 Health & Wellness

#### Appalachian Sustainable Agriculture Project

\$137,666 Economic Opportunity

\$18,000 Leverage Fund \$50,000 Sustainable Organizations

\$50,000 Health & Wellness

#### Arc of Buncombe County Inc

\$25,000 Health & Wellness

## Arteria Collective \$100,000

Asheville Area
Arts Council

\$50,000 Education

Asheville Buncombe Community Christian Ministry \$9,950

Leverage Fund

\$100,000 Behavioral Health & Substance Use Disorder

#### Asheville Buncombe Community Land Trust

Garnet Prose +
Projects (on behalf
of the Historic
Stumptown
Neighborhood
Association)
\$35,000
Racial Equity

#### Asheville Buncombe Community Land Trust \$2.985

\$2,985 Leverage Fund

\$45,770 Sustainable Organizations

#### Asheville Buncombe Community Land Trust

\$27,363 Sustainable Organizations

### Asheville City Schools

Candace Pickens Park \$30,000 Racial Equity

#### Asheville City Schools

\$192,000 Education

\$97,000 Economic Opportunity

\$97,000 Housing

\$140,100 Economic Opportunity

\$140,100 Education

### Asheville Poverty Initiative

\$25,000 Health & Wellness

#### Asheville Tennis Association

\$10,000 Education

#### Asheville-Buncombe Technical Community College Foundation

\$168,680 Education

\$6,750 Education

#### Babies Need Bottoms Inc

\$50,000 Health & Wellness

#### BeLoved Asheville

\$75,000 Health & Wellness

\$15,000 Leverage Fund

#### **Big Brothers-Big Sisters of Western North Carolina Inc**

\$300,000 Behavioral Health & Substance Use Disorder

#### Blue Ridge National Heritage Area Partnership

\$50,000 Sustainable Organizations

### Blue Ridge Public Radio

\$6,500 Leverage Fund

#### **Bountiful Cities**

\$60,000 Health & Wellness

#### **Bounty & Soul**

\$65,000 Health & Wellness

\$50,900 Sustainable Organizations

\$35,000 Leverage Fund

## **Buncombe** County

\$50,000 Behavioral Health & Substance Use Disorder

#### Buncombe County Schools

\$150,000 Education \$105,750 Education

#### Buncombe County Schools Foundation Incorporated

Buncombe County Schools Family Resource Center \$198,686

\$198,686 Education

### Buncombe Justice Partners

\$38,000 Racial Equity

### By Any Means AVL.

\$50,000 Behavioral Health & Substance Use Disorder

## Campaign for Southern Equality

\$25,000 Health & Wellness

#### CareReach

\$250,000 Health & Wellness

#### Carolina Day School

Horizons at Carolina Day \$50,000 Education \$100,000 Education

#### Carolina Small Business Development Fund

\$112,000 Economic Opportunity

\$264,063 Economic Opportunity

#### Center for Agricultural & Food Entrepreneurship (CAFE)

\$125,000 Economic Opportunity

#### Center for Conscious Living and Dying \$15,000

Health & Wellness

#### Center For Participatory Change Inc

\$12,000 Leverage Fund

#### Central United Methodist Church

\$20,000 Sustainable Organizations

#### Children First Communities In Schools of Buncombe County Inc \$200,000 Education

\$150,000 Education

\$75,000 Advocacy Childrens Home Society of North Carolina Inc \$18,000 Leverage Fund

## Chosen P.O.D.S., Inc

\$160,000 Education

#### Christmount Christian Assembly Inc

\$1,500 Leverage Fund

\$4,250 Leverage Fund

#### City of Asheville

\$187,750 Behavioral Health & Substance Use Disorder \$50,000 Housing

#### Colaborativa La Milpa

Compañeros Inmigrantes de las Montañas en Acción \$50,000 Racial Equity

#### Colaborativa La Milpa

El Telar: Resources for Home-based Childcare \$35,000 Education

#### Colaborativa La Milpa

PODER Emma \$26,000 Housing

\$26,000 Racial Equity

#### Colaborativa La Milpa

\$55,300 Sustainable Organizations

\$315,560 Economic Opportunity

\$247,940 Housing

#### Community Action Opportunities

\$650,500 Education

\$312,500 Economic Opportunity

#### Delta House Life Development Of Asheville Inc

\$17,000 Education

\$33,000 Racial Equity

#### Eagle Market Street Development Corporation, CDC

\$12,000 Leverage Fund

\$12,000 Leverage Fund

\$12,000 Leverage Fund

#### Eagles Wings Community Development

\$5,500 Leverage Fund

#### **Eblen Charities**

\$25,000 Health & Wellness

\$200,000 Economic Opportunity

#### Eliada Homes Inc

\$100,000 Behavioral Health & Substance Use Disorder

#### EMSDC Catawba Vale Innovation Space

\$200,000 Economic Opportunity

#### FIRST at Blue Ridge, Inc

\$162,500 Behavioral Health & Substance Use Disorder

### Food Connection Inc

\$25,000 Health & Wellness

## Foster Family Alliance of NC

\$65,000 Health & Wellness

\$25,000 Health & Wellness \$30,000 Sustainable Organizations

## Friends of Land of Sky

\$40,000 Sustainable Organizations

## Getting Back to the Basics

\$50,000 Racial Equity

#### Girls on the Run of WNC, Inc (GOTRWNC)

\$50,000 Education

### Givens Estates, Inc

\$45,000 Sustainable Organizations

\$51,750 Sustainable Organizations

#### Green Built Alliance

\$150,000 Housing

#### **H3 Collective**

\$12,500 Leverage Fund

#### **Hammer & Heart**

\$30,000 Sustainable Organizations

#### Haywood Street Community Development

\$2,000,000 Housing

#### Helping At-Risk Kids

\$50,000 Education

#### Helpmate

\$7,500 Leverage Fund

\$75,000 Health & Wellness

\$7,500 Leverage Fund

#### Homeward Bound of Western North Carolina Inc

\$2,500 Leverage Fund

\$70,000 Behavioral Health & Substance Use Disorder \$42,000 Sustainable Organizations

## Housing Authority of the City of Asheville

\$165,000 Education

## Housing Authority of the City of Asheville

\$65,000 Racial Equity

#### **Impact Health**

\$1,202,730 Healthy Opportunities

\$4,608,808 Healthy Opportunities

#### Jewish Family Services of WNC

\$25,000 Health & Wellness

#### Jordan Peer Recovery, Inc

\$75,000 Health & Wellness

#### Journeymen Asheville

\$35,000 Education

**Just Economics** 

\$55,000

**Economic Opportunity** 

Land of Sky **Regional Council** 

\$76.515

Behavioral Health & Substance Use

Disorder

\$76.515

Behavioral Health

& Substance Use

Disorder

\$119.332.67

Sustainable

**Organizations** 

\$34.018

Health & Wellness

\$528,200

**Economic Opportunity** 

\$50,000

Housing

\$80,000

Sustainable Organizations

\$9.500

Leverage Fund

\$200,000

**Economic Opportunity** 

\$250,000

**Economic Opportunity** 

\$125,000

Housing

\$125,000

**Economic Opportunity** 

\$275,000 Housing

\$9.500

Leverage Fund

**Legal Aid of North** Carolina

\$125,000 Advocacy

\$125,000 Housing

**Literacy Together** 

\$95,000

Education

\$8.500 Sustainable

**Organizations** 

**MAHEC** 

\$250,000

Health & Wellness

\$150,000

Health & Wellness

\$100,697

**Economic Opportunity** 

\$168,491

Health & Wellness

\$25,000

Health & Wellness

\$50,000

Health & Wellness

Meals on Wheels of Asheville and Buncombe **County Inc** 

\$25,000 Health & Wellness

**MemoryCare** 

\$100,000 Health & Wellness

Montreat College

\$371,999

**Economic Opportunity** 

\$15,000

Sustainable **Organizations** 

Mountain **BizWorks** 

\$300,000 **Economic Opportunity** 

\$10,000 Leverage Fund Mountaincare Inc

\$25,000

Health & Wellness

MusicWorks **Asheville** 

\$20,000 Education

\$28.228 Education

**NC Center for** Health and Wellness

\$4.000 Leverage Fund

\$274,170 Community Investment Opportunities

\$199.073 Education

**OnTrack Financial Education &** Counselina

\$50,000 Health & Wellness

\$50,000

Health & Wellness

\$100,000 Racial Equity OpenDoors of Asheville

\$16.800 Leverage Fund

\$161.955 Education

Operation Gateway

\$18.000 Leverage Fund

\$8.500 Leverage Fund

\$39,750 Behavioral Health & Substance Use Disorder

\$24,750 Racial Equity

\$10,500 Sustainable Organizations

**Partners** Unlimited, Inc \$25,000

Education

\$10,000 Education

**Peak Academy** Charter School

\$60,600 Sustainable Organizations

Pisgah Legal Services

\$2.026,435 Health & Wellness

**Pivotpoint Wnc** 

\$150,000 Behavioral Health & Substance Use Disorder

Reach Out and Read - North Carolina

\$120,500 Education

Read to Succeed Asheville/ Buncombe \$82.500

\$27.500 Racial Equity

Education

**RHA Health** Services Inc

\$15.042 Housing

\$214.644 Housing

#### Riverlink Inc

\$50,000 Education

#### SeekHealing

\$71,500 Behavioral Health & Substance Use Disorder

\$67,500 Behavioral Health & Substance Use Disorder

\$67,500 Behavioral Health & Substance Use Disorder

\$12,000 Leverage Fund

\$36,000 Sustainable Organizations

#### **Serve to LEAD**

#### Youthful HAND

\$63,750 Education

\$21,250 Racial Equity

#### Sistas Caring 4 Sistas

\$266,676.50 Racial Equity

#### Skyland United Methodist Church

\$16,666 Education

#### Sunrise Community for Recovery and Wellness

\$250,000 Behavioral Health & Substance Use Disorder

\$13,500 Leverage Fund

\$50,000 Sustainable Organizations

## The Asheville City Schools Foundation

Glitter Sisters \$50,000 Racial Equity

## The Asheville City Schools Foundation

\$62,500 Racial Equity

\$55,000 Education

\$145,000 Racial Equity \$18,090 Education

\$15,410 Racial Equity

#### The Christine Avery Learning Center Inc

\$90,000 Education

\$60,000 Racial Equity

\$85,050 Education

\$49,950 Racial Equity

#### The Community Foundation of Western North Carolina Inc

WNC Nonprofit Pathways \$300,000 Sustainable Organizations

## The Community Foundation of Western North Carolina Inc

\$150,000 Community Investment Opportunities \$20,000 Community Investment Opportunities

\$250,000 Community Investment Opportunities

#### The Council on Aging of Buncombe County Inc

\$86,900 Health & Wellness

## The Hope Chest for Women

\$15,000 Health & Wellness

## The Hundred Movement, Inc

\$12,500 Health & Wellness

#### The North Carolina Arboretum Society

\$133,000 Education

## The Utopian Seed Project

\$16,250 Leverage Fund

#### Umoja Health, Wellness and Justice Collective

\$55,000 Behavioral Health & Substance Use Disorder

\$60,000 Sustainable Organizations

\$15,000 Leverage Fund

#### United Way of Asheville & Buncombe County

\$6,000 Leverage Fund

\$500,000 Racial Equity

#### University of North Carolina Asheville

\$53,075 Health & Wellness

#### University of North Carolina Asheville Foundation Inc \$139.814.32

Education

#### Verner

\$244,933 Education

\$8,750 Education

#### Veterans Treatment Court of Western North Carolina Foundation, Inc

\$35,820 Sustainable Organizations

\$30,348 Sustainable Organizations

#### Western North Carolina AIDS Project Inc

\$250,000 Behavioral Health & Substance Use Disorder

#### Western North Carolina Community Health Services Inc

\$15,000 Health & Wellness

\$100,000 Behavioral Health & Substance Use Disorder

\$25,000 Health & Wellness

\$7,500 Health & Wellness

\$50,000 Health & Wellness

Western North Carolina Region Education Service Alliance (WRESA)

\$274,000 Education

WNC Bridge Foundation

\$250,000 Housing

\$250,000 Racial Equity

WNC Communities

\$133,000 Economic Opportunity

WNC Health Network Inc

\$58,000 Health & Wellness \$156,000 Health & Wellness

\$96,854 Behavioral Health & Substance Use Disorder

\$20,000 Sustainable Organizations

YMI Cultural Center

\$97,417 Racial Equity

\$430,891 Racial Equity

\$6,000 Leverage Fund

Young Men's Christian Association of Western North Carolina

\$75,000 Health & Wellness

\$268,174 Education

\$15,000 Leverage Fund

\$181,907 Education Youth OUTRight

\$100,000 Behavioral Health & Substance Use Disorder

Ytl Training Programs

\$133,000 Education

\$33,000 Racial Equity

\$32,400 Sustainable Organizations

\$15,000 Sustainable Organizations

**Burke County** 

AIDS Leadership Foothills-area Alliance (ALFA)

\$114,666 Behavioral Health & Substance Use Disorder

Burke County Department of Health

\$175,000 Behavioral Health & Substance Use Disorder \$175,000 Behavioral Health & Substance Use

Disorder

Burke County Department of Social Services \$10,500

Health & Wellness

Burke County Public Schools

\$22,000 Housing

Burke County United Way

\$122,613 Community Investment Opportunities

\$56,550 Education

City of Morganton

\$350,000 Housing

**County of Burke** 

\$275,000 Behavioral Health & Substance Use Disorder Foothills Conservancy of North Carolina Inc \$51,000

\$51,000 Housing

North Carolina School for the Deaf at Morganton Foundation, Inc

\$500,000 Housing

\$4,500 Leverage Fund

Open Hearts Place

\$90,000 Housing

The Enola Group Inc

\$6,750 Education

The Industrial Commons

\$3,600 Leverage Fund

\$330,000 Economic Opportunity

\$40,000 Sustainable Organizations Western North Carolina Workers Center

JMPro Community Workers Center

\$50,000 Racial Equity

Western Piedmont Community College \$16,000

Leverage Fund \$170.505

Economic Opportunity

\$11,500 Leverage Fund

Western Piedmont Council of Governments

\$50,000 Economic Opportunity

\$50,000 Housing

\$23,565 Sustainable Organizations

**Cherokee County** 

**Cherokee County** 

\$25,000

Health & Wellness

\$200,000 Behavioral Health & Substance Use Disorder

Cherokee County Schools

\$88,073 Education

\$88,072 Economic Opportunity

Town of Murphy

\$55,000 Housing

Tri-County Community College

\$367,450 Housing

\$250,000 Economic Opportunity

**Clay County** 

**Clay County** 

\$300,000 Behavioral Health & Substance Use Disorder

\$67,000 Health & Wellness

\$500,000 Housing \$25,000 Health & Wellness

\$50,000 Health & Wellness

Clay County Schools

\$400,000 Education

\$122,307.81 Education

\$122,307.80 Economic Opportunity

Hinton Rural Life Center

\$24,370 Health & Wellness

\$150,000 Economic Opportunity

Western Carolina Pacesetters, Inc

\$137,333 Education

Graham County

**Graham County** \$15,000

Health & Wellness Gove \$20,00

Graham County Public School

\$147,173 Economic Opportunity

\$147,173 Education

**Haywood County** 

First United Methodist Church of Waynesville

\$120,000 Behavioral Health & Substance Use Disorder

\$267,840 Education

Haywood Christian Ministry Inc

\$25,000 Health & Wellness

Haywood Community College \$500,000

Education **Haywood County** 

Government \$20,000 Health & Wellness Haywood County Schools

\$175,000 Education

\$375,234 Education

\$144,479 Economic Opportunity

\$144,479 Education

Mountain Projects Inc

\$123,168 Health & Wellness

\$123,168 Health & Wellness

\$208,880 Education

\$50,000 Housing

\$8,750 Education

\$666,154.50 Economic Opportunity

\$666,154.50 Housing Pigeon Community Development Center

\$41,000 Education

\$24,000 Racial Equity

Thirtieth Judicial District Domestic Violence-Sexual Assault Alliance

\$97,457.24 Racial Equity

**Town of Canton** 

\$125,000 Behavioral Health & Substance Use Disorder Haywood

UNETE, INC \$116,000 Education

\$50,000 Racial Equity

United Way of Haywood County

\$1,000,000 Community Investment Opportunities **Henderson County** 

Blue Ridge Community College Education Foundation Inc

Blue Ridge Community Colllege

\$197,440 Education

Blue Ridge Community College Education Foundation Inc

\$250,000 Economic Opportunity

\$8,750 Education

**Blue Ridge Health** 

\$279,500 Behavioral Health & Substance Use Disorder

\$177,302.40 Health & Wellness

\$118,201.60 Education

\$75,000 Health & Wellness

\$50,000 Health & Wellness

#### Boys & Girls Club of Henderson County

\$61,618 Economic Opportunity

\$150,000 Behavioral Health & Substance Use Disorder

\$155,000 Education

#### Camplify

\$12,000 Education

#### Children & Family Resource Center of Henderson County Inc

\$75,000 Education

\$283,619 Education

\$10,750 Education

\$35,000 Health & Wellness

#### City of Hendersonville \$100,000

\$100,000 Housing

#### **Environmental Educators of North Carolina**

\$19,029 Education

#### Hands On! Children's Museum

\$150,000 Education

#### Helping Hand Developmental Center Inc

\$80,000 Education

\$3,240 Sustainable Organizations

\$7,250 Leverage Fund

\$15,000 Sustainable Organizations

#### Henderson County

\$25,000 Health & Wellness

#### Henderson County Education Foundation Inc

\$50,000 Education

#### Henderson County Free Medical Clinic Inc

\$66,667 Behavioral Health & Substance Use Disorder

#### Henderson County Habitat for Humanity

\$94,180 Economic Opportunity

\$94,180 Housing

\$109,386 Housing

#### Henderson County Public Defender's Office

\$80,000 Behavioral Health & Substance Use Disorder

#### Henderson County Public Schools

\$170,820 Education

\$115,300 Economic Opportunity

\$115,300 Education

### Hope Coalition \$75,000

Behavioral Health & Substance Use Disorder

#### Love and Respect Community for Recovery and Wellness

\$75,000 Behavioral Health & Substance Use Disorder

\$175,000 Behavioral Health & Substance Use Disorder

#### Mills River Life Enrichment Center / MRLEC

\$10,000 Health & Wellness

#### Mountain Page Theater

\$8,100 Education

#### Smart Start Partnership For Children Inc

\$545,000 Education

\$250,000 Education

#### The Council on Aging for Henderson County

\$84,362 Health & Wellness

#### The Housing Assistance Corporation \$50,000

\$50,000 Housing

\$75,000 Housing

#### Flat Rock Playhouse

\$18,000 Leverage Fund

#### **Thrive**

\$58,033.93 Housing

\$6,000 Leverage Fund

#### True Ridge

\$37,500 Education

\$87,500 Economic Opportunity

\$25,000 Racial Equity

#### United Way of Henderson County \$110,523 Education

#### Western Carolina Community Action Inc

\$239,072 Education

\$8,750 Education

#### **Jackson County**

#### Blue Ridge Free Dental Clinic \$120,000

Health & Wellness

### Boys & Girls Club of The Plateau

\$8,500 Leverage Fund

\$250,000 Education Child Medical Collaborative Inc \$100,000

Health & Wellness

\$32,375 Sustainable Organizations **HIGHTS** 

\$249,001 Behavioral Health & Substance Use Disorder

\$4,100 Leverage Fund

\$191,730 Education

Jackson County Department of Social Services

\$20,000 Health & Wellness

\$20,580 Health & Wellness

Jackson County Economic Development

\$63,500 Housing

Jackson County Local Government

\$174,500 Housing - ARPA Advantage

\$184,214.50 Behavioral Health & Substance Use Disorder Jackson County Public Schools

\$160,000 Education

\$137,000 Education

\$137,000 Economic Opportunity

Meridian Behavioral Health Services Inc

\$100,000 Behavioral Health & Substance Use Disorder

Southwestern Child Development Commission

\$168,836 Education

\$30,000 Education

\$17,250 Education

\$170,000 Education

\$200,000 Education Southwestern Commission

\$184,586 Economic Opportunity

\$140,000 Behavioral Health & Substance Use

Disorder

\$60,000 Economic Opportunity

\$54,247.62 Sustainable Organizations

\$150,000 Economic Opportunity

\$145,000 Economic Opportunity

\$23,000 Economic Opportunity

\$18,000 Leverage Fund

Southwestern Community College

\$250,000 Economic Opportunity

Sylva First United Methodist Church

\$110,600 Education The Hampton School, Inc

\$30,156 Education

Vecinos Inc

\$40,000 Health & Wellness

\$90,000 Behavioral Health & Substance Use Disorder

Western Carolina University

\$245,889 Education

\$231,728 Education

\$400,000 Economic Opportunity

\$64,000 Behavioral Health & Substance Use Disorder

\$140,000 Behavioral Health & Substance Use Disorder

\$50,505 Health & Wellness \$8,750 Education

**Macon County** 

**Discover Church** \$600,000 Housing

First Franklin UMC \$64,500 Education

Highlands-Cashiers Health Foundation

\$110,000 Behavioral Health & Substance Use Disorder

\$150,000 Behavioral Health & Substance Use Disorder

\$18,750 Health & Wellness

Macon County \$25,000 Health & Wellness

Macon County
Housing
Department
\$50,000
Housing

Macon County Public Health \$80.000

Health & Wellness

Macon County Schools

\$164,432

Economic Opportunity

\$164,432 Education

\$15,000 Leverage Fund

Mainspring Conservation Trust, Inc \$150,000

Economic Opportunity

Nantahala Health Foundation

\$18,750 Health & Wellness

The Literacy & Learning Center

\$50,000 Education

Town of Franklin \$20,000

\$20,000 Broadband

#### **Madison County**

Community Housing Coalition of Madison County Inc \$121,733

\$50,000 Housing

Housing

\$20,000 Sustainable Organizations

### Holler Harm Reduction

\$55,000 Behavioral Health & Substance Use Disorder

#### Hot Springs Health Program Inc

\$40,000 Health & Wellness

\$50,000 Health & Wellness

#### **Madison County**

Spring Creek Community Center, Inc \$350,000 Economic Opportunity

#### **Madison County**

\$18,000 Leverage Fund

\$43,000 Health & Wellness

\$4,500 Leverage Fund

\$250,000 Economic Opportunity

#### Madison County Health Department

\$150,000 Behavioral Health & Substance Use Disorder

#### Madison County Schools

\$400,000 Education

#### Partnership for Appalachian Girls' Education (PAGE)

\$125,500 Education

#### McDowell County

**Camp Grier** \$4,370 Leverage Fund \$165,000 Education

#### Centro Unido Latino Americano

\$75,000 Health & Wellness

\$9,000 Leverage Fund

\$33,500 Education

\$16,500 Racial Equity

\$30,000 Sustainable Organizations

#### East Marion International Pentecostal Holiness Church en Español \$50,000

Economic Opportunity

#### Equip International \$7.250

Leverage Fund

#### Gateway Wellness Foundation

\$6,300 Leverage Fund \$50,000 Housing

\$220,000 Behavioral Health & Substance Use Disorder

\$350,000 Housing

\$40,000 Housing

\$40,000 Economic Opportunity

\$37,500 Health & Wellness

\$150,000 Behavioral Health & Substance Use Disorder

#### **McDowell County**

\$20,000 Health & Wellness

#### McDowell County Schools

\$249,900 Education

\$90,982.28 Economic Opportunity

\$90,982.28 Education

#### **Mcdowell LFAC**

\$92,000 Health & Wellness

#### McDowell Technical Community College \$325,000

\$325,000 Education

\$4,750 Education

\$281,842 Economic Opportunity

\$281,842 Housing

#### Mission Ministries Alliance \$54,100

Sustainable
Organizations

#### West Marion Community Forum Inc

\$137,115 Racial Equity

\$30,000 Sustainable Organizations

#### **Mitchell County**

#### AMY Wellness Foundation

\$380,000 Housing

\$37,500 Health & Wellness

#### **MAY Coalition**

\$89,000 Economic Opportunity

#### Mayland Community College \$150,000

**Economic Opportunity** 

#### Mayland Community College Foundation

\$25,000 Leverage Fund

#### Mitchell County Government

\$11,100 Health & Wellness

#### Mitchell County Schools

\$175,000 Education

\$240,500

**Economic Opportunity** 

\$240,500 Education

\$26,650 Education

#### Mountain Community Health Partnership

\$75,000 Behavioral Health & Substance Use Disorder

\$40,000 Health & Wellness

\$40,000 Health & Wellness

\$75,000 Health & Wellness

\$6,700 Leverage Fund

\$20,000 Leverage Fund

\$50,000 Health & Wellness

#### SEARCH

\$25,000 Sustainable Organizations

## Town of Spruce Pine

\$100,000 Economic Opportunity

#### **Polk County**

#### Aspire - Polk County Children and Family Partnership Children's Advocacy Center \$100,000 Health & Wellness

#### Higher Academia Corporation

\$52,330 Education

#### Polk County Community Foundation

\$34,500 Housing

#### Polk County Health and Human Services Agency

\$100,000 Racial Equity

\$6,250 Leverage Fund

### Polk County Local Government

\$25,000 Health & Wellness

\$299,998.50 Behavioral Health & Substance Use Disorder

#### Polk County Schools

\$93,325 Economic Opportunity

\$93,325 Education

#### Roseland Community Center Inc

\$40,000 Racial Equity

### Steps to HOPE Inc

\$55,960 Sustainable Organizations

\$55,960 Sustainable Organizations

#### Thermal Belt Outreach Ministry, Inc \$6,300 Leverage Fund

#### **Qualla Boundary**

#### Cherokee Central Schools \$78.435

578,435 Education

\$30,000 Racial Equity

## Cherokee Indian Hospital Authority

\$76,500 Behavioral Health & Substance Use Disorder

#### Eastern Band of Cherokee Indians - Public Health & Human Service Division

\$50,000 Behavioral Health & Substance Use Disorder

### Sequoyah Fund Inc

Center for Native Health \$350,000 Racial Equity

## The Center For Native Health Inc

\$46,000 Sustainable Organizations \$6,000 Leverage Fund

#### **Rutherford County**

#### Blue Ridge Hope \$139,930 Education

#### Eden Of Abundance

\$30,000 Sustainable Organizations

\$95,000 Healthy Opportunities

## Foothills Regional Commission

\$18,000 Leverage Fund

\$250,000 Housing

#### Isothermal Community College

\$170,000 Education

\$126,500 Economic Opportunity

\$126,500 Housing

#### KidSenses Inc

\$130,000 Education

#### Out of the Ashes

\$8,500 Leverage Fund

#### Rutherford County

\$25,000 Health & Wellness

\$466,452 Housing

#### Rutherford County Habitat for Humanity, Inc

\$50,000 Sustainable Organizations

#### Rutherford County Schools

\$90,000 Economic Opportunity

\$90,000 Housing

\$84,658 Education

\$84,658

**Economic Opportunity** 

#### Rutherford Housing Partnership Inc

\$2,000 Leverage Fund

\$2,000 Leverage Fund

#### Rutherford Outdoor Coalition

\$50,000 Education

#### St. Gabriel's Episcopal Church

\$10,000 Health & Wellness

### Town of Rutherfordton

The Martin Luther King Committee of the New Hope Community \$29,800 Racial Equity

#### United Way Of Rutherford County Inc

\$192,500 Behavioral Health & Substance Use Disorder

## Unity In The Community

\$40,000 Racial Equity

\$30,000 Sustainable Organizations

#### Western NC Housing Partnership Inc

\$100,000 Housing

#### **Swain County**

#### **County of Swain**

Marianna Black Library \$400,000

Economic Opportunity

#### County of Swain

\$20,000 Health & Wellness

\$50,000 Health & Wellness

\$125,000 Housing

#### **Grove Church**

\$97,500 Behavioral Health & Substance Use Disorder

#### Hawthorn Heights WNC

\$65,000 Behavioral Health & Substance Use Disorder

\$65,000 Housing

#### Marianna Black Library

\$14,000 Leverage Fund

#### Swain County Health Department

\$40,000 Health & Wellness

#### Swain County Schools

\$134,470 Education

\$134,470 Economic Opportunity

#### **Unidxs WNC**

\$1,800 Leverage Fund

#### Transylvania County

#### Boys And Girls Club of Transylvania County Inc \$2,000

Leverage Fund

\$12,500 Leverage Fund

\$1,800 Leverage Fund

\$42,500 Leverage Fund

\$161,000 Education

#### Centro Comunitario Hispano-Americano

\$5,000 Leverage Fund

\$25,000 Education

#### **Creating a Family**

\$105,000 Behavioral Health & Substance Use Disorder

## Family Place of Transylvania County

TC Strong \$103,668 Education

#### Family Place of Transylvania County

\$65,000 Behavioral Health & Substance Use Disorder

#### **FIND Outdoors**

\$50,000 Racial Equity

#### Isaac Homes Youth Shelter, Inc \$62,500 Education

Neighbors in Ministry, Inc/Rise & Shine

\$60,000 Education

\$136,738 Education

## Pisgah Health Foundation

\$368,000 Health & Wellness \$37,500 Health & Wellness

#### **Sharing House**

\$12,500

**Economic Opportunity** 

\$12,500 Housing

#### Smart Start of Transylvania County

\$220,000 Education

\$100,000 Health & Wellness

#### **SparkPoint**

\$9,000 Leverage Fund

\$2,000 Leverage Fund

#### Transylvania County Administration

\$20,000 Health & Wellness

#### Transylvania Habitat for Humanity Inc \$75,000

Housing

\$550,000 Housing

#### **Yancey County**

Dig In! Yancey Community Garden

\$50,000 Health & Wellness

Parkway Playhouse of Burnsville Inc

\$20,000 Education

Yancey County Government

\$25,000 Health & Wellness

\$24,500 Housing

Yancey County Public Schools

\$71,785 Education

\$185,000 Education \$185,000 Economic Opportunity

\$166,660 Education Grantees headquartered outside of WNC

Abundance Capital \$333,273 Economic Opportunity

Appalachian Community Capital \$574,198

Appalachian State University \$46,342

**Economic Opportunity** 

\$46,342 Health & Wellness

Appalachian State University Foundation, Inc

\$25,000 Education

\$25,000 Economic Opportunity

Association of Black Foundation Executives Inc

\$25,000 Community Investment Opportunities Autism Society of North Carolina \$50,000

Economic Opportunity

\$141,000 Education

**Boundless Impact** \$50,000 Economic Opportunity

Catawba Valley Leadership Foundation

\$156,500 Economic Opportunity

\$80,000 Education

Center for Child & Family Health \$50,000 Education

Community Education Group \$23,500

\$23,500 Advocacy

**Dayspring Foundation**\$92,566.50
Behavioral Health
& Substance Use
Disorder

\$150,000 Behavioral Health & Substance Use Disorder

East Tennessee State University \$24,993 Health & Wellness

\$99,987 Health & Wellness

ECU Medical & Health Sciences Foundation, Inc

\$40,000 Health & Wellness

EducationNC \$94,500 Advocacy

\$40,500 Education

Foundation for Appalachian Kentucky Inc

Appalachia Funders Network \$25,000 Community Investment Opportunities Foundation for Appalachian Kentucky Inc \$195.650

Health & Wellness

**Go Global NC** \$132.342.23

**Economic Opportunity** 

Grantmakers In Health

\$25,000 Community Investment Opportunities

HealthConnect One

\$100,000 Health & Wellness

High Country Caregivers

\$35,000 Health & Wellness

Hunger and Health Coalition \$10.000

Healthy Opportunities

**Institute Capital** 

\$340,000 Economic Opportunity Least of These Carolinas, Inc \$15,000 Health & Wellness

Mission Investors Exchange Inc

\$25,000 Community Investment Opportunities

myFutureNC \$250,000 Economic Opportunity

North Carolina Administrative Office of the Courts

\$334,551 Health & Wellness

North Carolina Alliance for Health

Care4Carolina \$105,000 Health & Wellness

North Carolina Community Foundation, Inc

Invest Early NC \$50,000 Education

#### North Carolina Community Foundation, Inc

North Carolina Network of Grantmakers

\$25,000 Community Investment Opportunities

#### North Carolina Community Foundation, Inc

\$50,000 Advocacy

#### North Carolina Employee Ownership Center

\$55,000 Economic Opportunity

#### North Carolina Harm Reduction Coalition

\$50,000 Behavioral Health & Substance Use Disorder

\$100,000 Behavioral Health & Substance Use Disorder

#### North Carolina Independent Colleges & Universities \$224,000

North Carolina Institute of Medicine

\$25,000 Community Investment Opportunities

Education

#### North Carolina Justice Center

\$75,000 Advocacy

## North Carolina State University - Office of Sponsored Programs

\$56,109 Economic Opportunity

\$31,734.68 Education

\$100,000 Education

#### North Carolina State University / Center for Environmental Farming Systems \$96,098

Northwestern Housing Enterprises, Inc \$700.000

Health & Wellness

\$900,000 Housing

Housing

#### PBS North Carolina

\$87,690 Education

#### Philanthropy Southeast

\$25,000 Community Investment Opportunities

#### **PRISM**

\$50,000 Behavioral Health & Substance Use Disorder

#### Public School Forum of North Carolina Inc \$308,560 Education

#### Reinvestment Fund Inc

\$313,360 Economic Opportunity

#### ResilNC

\$50,000 Economic Opportunity

#### Rural Economic Development Center

\$818,028 Economic Opportunity

## Salvation Army of Henderson County

\$60,000 Education

#### Southern Conservation Partners

Constructive
Learning Design/
RootEd
\$220,000
Education

#### **STEM West Inc**

\$93,488 Education

## The Conservation Fund/Resourceful Communities

\$188,280 Economic Opportunity

\$141,210 Health & Wellness

\$141,210 Sustainable Organizations

#### University of North Carolina at Chapel Hill

\$171,030 Economic Opportunity

\$68,759 Education

WAMY Community Action Inc \$50,000 Housing



#### statement of

## financial position

| assets:                                | 2023            | 2022            | 2021            |
|--|-----------------|-----------------|-----------------|
| Cash and cash equivalents              | \$15,109,910    | \$10,800,400    | \$14,098,226    |
| Sales tax receivables                  | 63,231          | 251,397         | 435,639         |
| Investments, at fair value             |                 |                 |                 |
| Program-related investments, net       |                 |                 |                 |
| Fixed assets, net                      | 13,688,028      | 13,918,214      | 13,449,678      |
| Other assets                           | 50,853,477      | 1,697,153       | 786,980         |
| Total Assets:                          | \$1,906,382,918 | \$1,728,400,901 | \$2,096,451,010 |
| liabilities & net assets:              | 2023            | 2022            | 2021            |
| Liabilities                            |                 |                 |                 |
| Grants payable                         | 37,137,463      | 26,610,369      | 26,158,554      |
| Accounts payable                       | 942,739         | 686,498         | 873,344         |
| Notes payable                          | 26,721,787      | 21,166,847      | 17,090,441      |
| Total Liabilities:                     | \$64,801,989    | \$48,463,714    | \$44,122,339    |
| Net Assets with donor restrictions:    | \$13,965,199    | \$11,446,564    | \$6,475,955     |
| Net Assets without donor restrictions: | \$1,827,615,730 | \$1,668,490,623 | \$2,045,852,716 |
| Total Liabilities & Net Assets:        | \$1,906,382,918 | \$1,728,400,901 | \$2,096,451,010 |

As of Dec. 31, 2023

### statement of

## activities

| revenues:                        | 2023            | 2022            | 2021            |
|----------------------------------|-----------------|-----------------|-----------------|
| Contributions received           |                 |                 |                 |
| Total Revenues:                  | \$270,622,426   | \$(276,167,361) | \$477,412,592   |
| expenses:                        | 2023            | 2022            | 2021            |
| Compensation and benefits        | 10,704,752      | 9,399,658       | 7,395,106       |
| Professional fees                | 3,282,588       | 3,298,663       | 3,176,653       |
| Other expenses                   | 3,774,820       | 2,538,444       | 2,701,344       |
| Total Expenses:                  | \$17,762,160    | \$15,236,765    | \$13,273,103    |
| grants approved:                 | 2023            | 2022            | 2021            |
| Grants approved                  | 91,216,524      | 80,987,358      | 96,088,812      |
| Total Grants Approved:           | \$91,216,524    | \$80,987,358    | \$96,088,812    |
| Change in Net Assets:            | \$161,643,742   | \$(372,391,484) | \$368,050,677   |
| Net Assets at Beginning of Year: | \$1,679,937,187 | \$2,052,328,671 | \$1,684,277,994 |
| Total Liabilities & Net Assets:  | \$1,841,580,929 | \$1,679,937,187 | \$2,052,328,671 |

As of Dec. 31, 2023



890 Hendersonville Road, Asheville, NC 28803

dogwoodhealthtrust.org

#### stay in touch:







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