



Kevin McDonald heads TROSA, a Durham nonprofit that aids substance abusers and has been funded by the Durham Merchants Association Charitable Foundation.

File photo

## MERCHANTS

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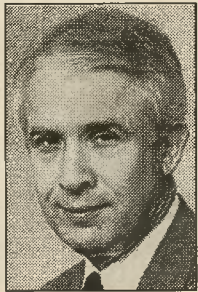
businesses and in turn, help make the nonprofit self-supporting.

"These people had faith in us," says McDonald, TROSA's executive director. "They had faith in an idea when they gave us the first grant. And when the idea came to fruition, they supported us. That's what philanthropy is all about, giving philanthropy a chance."

Other grants last year by the Merchants Association Foundation range from \$425 for computer software for the Retired Senior

Volunteer Program to \$10,000 to the West End Community Center for a revitalization program.

Larry D. Brock, senior vice president of BB&T, is president of the foundation's board of directors. New board members are Wayne Campbell, president of Credit Bureau



Larry D. Brock

Systems - a company spun off from the old Merchants Association; Kathy Land, a community volunteer; and Susan Cranford Ross, associate dean and director of arts and sciences development for Duke University.

Board members whose terms ended were Jeff Stewart, president and chief executive of Guaranty State Bank; Frank Ward, president of Frank Ward Realty, and Carl Woods, chief executive of C.C. Woods Construction.

For information on the foundation, call Executive Director Leesa Campbell, (919) 489-5405.

## DUKE

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Foundation with \$1 billion in assets. The foundation - whose future grant-making remains uncertain until the lawsuits are resolved - will provide funds for environmental and ecological causes, education, medical research, the prevention of cruelty to children and animals and the performing arts.

When funded, it will join the

ranks of the nation's wealthiest foundations. In North Carolina, only the Duke Endowment in Charlotte, with \$1.3 billion in assets, would have a larger endowment. James B. Duke created that foundation.

At the Duke news conference, Lafferty, wearing a diamond earring and his characteristic long hair tied in a pony tail, said he looks forward to continuing the Duke family's long relationship with Duke University. Keohane is a member of the new foundation's board.

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## BLUMENTHAL

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AIDS Consortium at The Foundation for the Carolinas, \$15,620; and the national Sierra Club Foundation, \$100,000 over five years.

"Different family members are involved in all different kinds of organizations," says Philip Blumenthal. "So between the social services and human services, education, the environment - we give to all those different fields."

Five family members are involved in the foundation: Herman Blumenthal; his wife, Anita; and their sons, Alan, Philip and Samuel.

Herman and his brother, I.D. Blumenthal - who founded the family business, Radiator Specialty Co. in Charlotte - were the original foundation donors in 1953.

"It was a very small foundation at that time," Herman Blumenthal says. "My brother left a lot of money to the foundation when he passed away [in the late 1970s] and that really made it."

Creating a foundation was a way for the family to channel its giving impulses.

"We had been giving money to charities and schools and so forth," says Herman Blumenthal, who grew up in Savannah, Ga. "We just thought it would be a good idea to have a foundation that we could build up. And we kept building it gradually as the business improved."

While the foundation has given significant dollars to nonprofits over the years, grantmaking is not the only measure of the family's philanthropy.

"It's as much the Blumenthal family and their caring as their dollars," says Daniel Lepow, director of the Jewish Federation. "I wouldn't minimize the dollars, but what's important is the Blumenthal family's involvement" in nonprofit causes.

Those causes are as varied as the foundation's grant recipients.

Herman Blumenthal, for example, has served on the boards of the University of North Carolina at Charlotte, Johnson C. Smith

## THE BLUMENTHAL FOUNDATION

**Location:** Charlotte

**History:** Founded in 1953 by members of the Blumenthal family, who also founded Radiator Specialty Co.

**Assets:** \$20.9 million for year ending 4/30/91

**Grants:** \$969,237 for year ending 4/30/91

**Interests:** Emphasis on religion, education, arts and environment. Also funds health care, media and civil liberties. Provides grants for seed money, operating budgets, capital campaigns, conferences, seminars, special projects and endowments.

**Deadlines:** The board of trustees meets quarterly to consider grant applications.

**Contact:** Philip Blumenthal, P.O. Box 34689, Charlotte, N.C. 28234, (704) 377-6555

University, Mercy Hospital, and the Foundation for the Carolinas.

Philip Blumenthal is a trustee and vice president of the national Sierra Club Foundation, and Samuel Blumenthal - who is a clinical psychologist - is active in Charlotte-area social service organizations.

Sanders, who became familiar with the foundation through its support of the United Way, cites the family's involvement in organizations such as the National Conference of Christians and Jews as a sign of its commitment to building community.

"And their action with the

Performing Arts Center is not only a major gift, but an innovation for a private foundation like that which normally doesn't get so heavily involved in bricks and mortar," he says.

Bob Hull, president of the Atlanta-based Southeastern Council of Foundations, cites the Wildacres Center in eastern North Carolina as another unique contribution by the Blumenthal family.

"It's a nice combination of regular grantmaking and doing this kind of facility provision, which is a little unusual," he says.

Like other family foundations in North Carolina and throughout the U.S., the Blumenthal Foundation is grappling with the issue of how best to prepare for the future.

Philip Blumenthal says family members are studying investment strategies and grantmaking policies, and have discussed the possibility of publishing an annual report.

One thing that won't change is the careful attention family members devote to running the foundation.

"Some families use it to fight, but that hasn't happened with us," he says.

On a broader level, he worries that the "ethic" of giving is not as strong as it should be in Charlotte.

"Not that long ago, Charlotte was not that wealthy a community," he says. "Now, there is a lot of money around but a lot of those people don't give to the level that they should."

"In my family, it was just expected that that's what you should do. It wasn't a matter of being pressured into things. But if you want to see your community prosper and grow, those are the things you need to do."

Apparently, there is no generation gap in the giving philosophy of the Blumenthals.

When asked for his advice to would-be philanthropists, Herman Blumenthal has this to say:

"If you have the money in a business, your own family-held business like this one, save as much as you can because there is always some good cause that you'll want to assist with."

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