

# Philanthropy Journal

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OF NORTH CAROLINA

Changing roles

## Jobs of consultants become more strategic

**Fundraising consultants in North Carolina say their jobs have evolved over the years to adapt to changes in the nonprofit sector. Trends include a growing emphasis on strategic planning and an increasing awareness by nonprofit clients of the importance of fundraising.**

BY BARBARA SOLOW

Even after 16 years in business as a consultant to nonprofits, Whitney

### FUNDRAISING

Jones says he's still trying to understand what fundraising is all about.

"It's a very complicated process that is loaded with intangibles," says Jones, founder of Whitney Jones Inc. in Winston-Salem. "When you go into the world of capital campaigns, no two are alike and managing becomes a very complex process."

As the number of nonprofits has grown and their fundraising needs have escalated, the consulting pro-

cess has become even more complicated, Jones says.

"Every year, we have reinvented and significantly modified what we do because what we are trying to do is constantly add value to these organizations."

Other fundraising consulting firms in North Carolina have seen similar changes. Industry leaders point to an increased awareness of the importance of fundraising, as competition for donor dollars has intensified.

"The level of development experience and sophistication of organiza-

tions and institutions that we are serving as clients has increased dramatically," says David Ross, president of Durham-based Ross Johnston and Kersting. "Some of the kinds of things we did more of 10 or 15 years ago are not necessary now because they [nonprofits] are doing more of that themselves and have people on their staffs who are experienced in campaigns."

The length of consulting time spent with any one nonprofit client actually may be shorter because of the higher level of in-house knowledge about fundraising, Ross says.

"Counsel is being used more to help plan and determine the magnitude of the campaign and not so much on the implementation and operation of it."

But Doug Alexander, president of Atlanta-based Alexander O'Neill Haas and Martin, says the opposite can also be true.

"We are actually spending more time with nonprofits," he says. "One reason is we are providing more services and another is that the cam-

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50 years of service

## Kate B. Reynolds Trust looks ahead

The Winston-Salem charitable foundation, which celebrates its 50th birthday March 13, helps the poor and medically needy in the state. New outreach efforts have revitalized the trust's mission and set a course for its work in the 21st century.

BY KELLY PRELIPP LOJK

"I can't tell you how highly I think of the Kate B. Reynolds Charitable Trust," says Barbara Garrison, executive director of Blue Ridge Community Health Services. "The trust's funding has changed the course of what we've done — without their initiative money, we couldn't have done this."

### GIVING

Garrison is referring to a grant the health center used in 1990 to create an outreach program for pregnant women that, Garrison says, helped halve Henderson County's infant mortality rate.

For the past 50 years, the Kate B. Reynolds Charitable Trust has inspired countless testimonials such as Garrison's. The foundation's staff is proud of its overall impact on helping the poor and medically needy in North Carolina. But perhaps its greatest source of pride is the dramatic impact that relatively small grants have made in the farthest corners and the most underserved communities in the state.

#### FORMATIVE YEARS

The Kate B. Reynolds Charitable Trust was created in 1947, when the will of the late Kate Gertrude Bitting Reynolds' bequeathed two-thirds of her estate, almost \$5 million - or \$42



The Empowering Family Center in Winston-Salem is one of the Kate B. Reynolds Charitable Trust's grantees. The program helps families build stronger relationships. Above, Chasidy Barr plays with her mother, Martha (left) and grandmother, Mamie Goodwin.

Photo courtesy of the Kate B. Reynolds Trust

million in today's dollars - to charity.

Mrs. Reynolds, who was married to R.J. Reynolds Tobacco Company chairman William Neal Reynolds, designated that the trust be divided into two divisions. One-fourth of the trust's income was to be used for the poor and needy in Winston-Salem and Forsyth County, and three-fourths of the income was to be used for charity patients in North Carolina hospitals.

During the trust's early years, trustees began to develop an informal

policy that increasingly focused on women, children, the medically needy and the elderly. The trust's focus remains much the same today.

Originally, trustees disbursed income earmarked for the poor and needy to individuals and organizations on an as-needed basis. Hospital funds were distributed according to a formula based on the number of charity patients each hospital treated.

By the early 1970s, the foundation's grant-making procedures had

changed greatly. Because of revisions in the federal tax code, the foundation was restricted to making grants only to organizations that carried 501(c)(3) tax-exempt status. The trust had to change from operating on a rather personal basis, providing many grants directly to needy individuals, to establishing more formal grant-making procedures with institutions.

Based on a request by trustees, the N.C. Supreme Court granted the

Look for REYNOLDS, page 23

## Caring for kids Youth home reflects leader's impact

MHC-Child and Family Services - formerly the Methodist Home for Children - has made significant changes since Rufus Stark became president of the agency in 1983. Stark retires in June.

BY ASHLEY PEAY

Raleigh

When Rufus Stark became president and chief executive officer of the Methodist Home for Children in 1983, the nonprofit agency was undergoing major changes.

### CHILDREN

What had been a church-supported home for orphaned children was in the process of becoming a family preservation agency that would care for troubled children with the hope of returning them to their families.



As Stark prepares to retire from his post at what is now MHC-Child and Family Services, he looks back on his early years with the organization as a "very tumultuous time."

But he also says that taking risks

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### NONPROFITS

#### An eye on the legislature

North Carolina nonprofits are gearing up for a legislative session expected to touch on issues ranging from welfare reform to environmental regulations.

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### FOUNDATIONS

#### Foundation to help Outer Banks

The Outer Banks Community Foundation faces a number of challenges in trying to meet community needs in Currituck, Dare and Hyde counties.

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### VOLUNTEERS

#### Schools steer students to public-interest law

University career development officers and nonprofits are trying to increase the percentage of students who practice public-interest law.

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### CORPORATE GIVING

#### Microsoft may end nonprofit discounts

Microsoft Inc. is considering whether to end its practice of giving academic discount prices on software sold to some nonprofits.

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### FUND RAISING

#### First Counsel banks on local connections

Charlotte-based consulting firm, First Counsel is quickly becoming one of the leaders in the field.

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