

FY23

THE LEON LEVINE FOUNDATION'S

YEAR IN REVIEW



A WORD FROM OUR PRESIDENT AND CEO

ON THE CONCLUSION OF FY23



The practice of reflection serves many purposes. At The Leon Levine Foundation, we pause to consider our wins and learn from our losses because of a lesson imparted to us by our Founder, Leon Levine. He believed in continuous improvement and mindful growth. To explain this concept, he adopted the phrase “polishing the stone.”

And so, each year, our team refines and recalibrates. We polish the systems and strategies employed to empower people and invest in communities. We are committed to fulfilling our philanthropic mission with excellence. From this standpoint, FY23 was undeniably a successful year.

But it was also a difficult year as we mourned the loss of Mr. Levine and determined how best to commemorate his legacy.

Together, we accepted that profound sorrow and hope can coexist - a reality reflected often in the strength of our nonprofit partners and the people they serve.

Now, we launch our next chapter as we perpetuate the legacy of giving that Mr. Levine so generously left for us all. We will build on the impactful work done over the past several decades; and we will add polished stones in the form of strategic grant-making, impact investing, and an amazing team of dedicated professionals. In this way, we each have the honor of keeping Mr. Levine’s memory alive.

In partnership,

A handwritten signature in black ink, appearing to read "Tom Lawrence, III". The signature is stylized and fluid.

TOM LAWRENCE, III
PRESIDENT AND CEO

REMEMBERING LEON LEVINE:

**BY: MICHAEL TARWATER,
CHARIMAN OF TLLF'S BOARD**



I first interacted with Leon Levine during the second phase of his career when he was living and working as a philanthropist. Shortly after I accepted the role of CEO of Carolinas HealthCare System (CHS; now Atrium Health), we “met” over the phone. Leon called me and asked if I’d considered offering naming rights to a donor for the soon-to-be-built children’s hospital in Charlotte.

I recall being impressed by the amount of homework he’d already done – regarding the project, my team, our track record, and financial condition. It was to be one of many interactions I’d go on to share with the renowned businessman.

Needless to say, we eventually reached an agreement that resulted

in the naming of The Levine Children’s Hospital.

Over the years, Leon and I would have numerous conversations about gifts to the healthcare system, not only for children’s services but also for cancer care – in the form of the Levine Cancer Institute (now in its third iteration) – as well as gifts related to psychiatric services – which ultimately led to The Mindy Ellen Levine Behavioral Health Center and the Sandra and Leon Levine Psychiatry Residency Program at Carolinas Medical Center.

So, I’d observed his philanthropic nature as an outsider and recipient of his generosity. And then, several years after my retirement from CHS, he asked me to join him in those efforts by becoming a member of The Leon Levine Foundation’s board and a Senior Advisor on staff.

Now, I had seen what he had done for CHS. And it was impossible not to notice the Levine name on buildings and intersections throughout Charlotte and beyond. But in joining him behind the scenes, I realized that these visible contributions are but the tip of the iceberg!

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I was impressed by the breadth of his giving, which was guided by principles that mirrored his business model at Family Dollar. He researched each organization thoroughly. Leadership, track record, and sustainability were of importance in every case. The same business model that brought him success as an entrepreneur shaped his success as a career philanthropist.

In both iterations of his career, Leon focused on the customer. His customers. He understood that the very people who shopped at Family Dollar stores were the same people turning to nonprofits for support. In healthcare, human services, education, and Jewish values, he wanted to give back to those who helped him succeed. And to the community he called home.

That message was loud and clear from day one inside the Foundation, and that is exactly the mindset we adopt in executing his vision.

Somewhere along the way, Leon and I became friends. Of this development I can say: the closer you got to him, the more tangible his care became. Leon Levine was a tough businessman. He was a generous philanthropist. But he was, to me, above all, a great friend.

While we miss him, we work daily to build on the incredible legacy he has already established. May we continue to help others with the same tenacity and passion that influenced Leon.

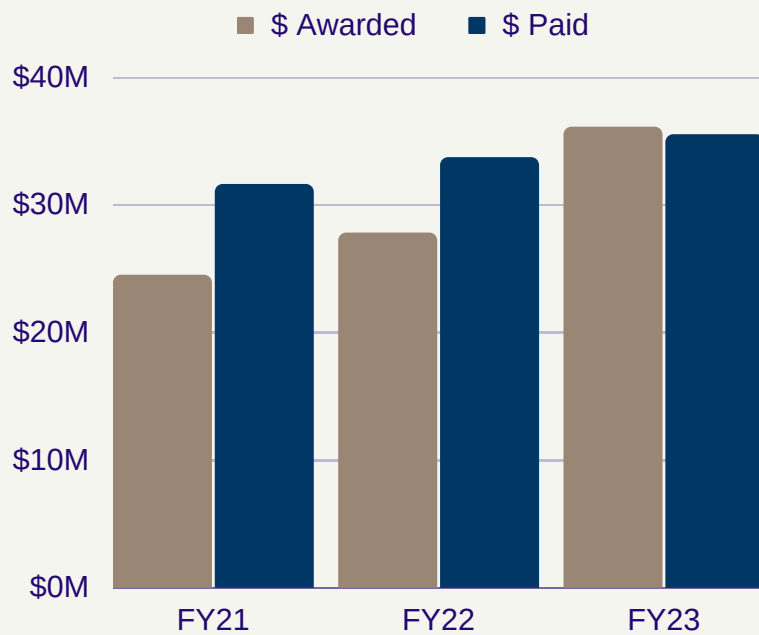
"SOMEWHERE ALONG THE WAY, LEON AND I BECAME FRIENDS."

-MICHAEL TARWATER



FY23 IMPACT

3-YEAR GRANTMAKING TRENDS



461

GRANTS AWARDED

\$36M+

36,097,300 IN
COMMITMENTS AWARDED

MISSION MOMENT: HUMAN SERVICES

SENIOR PROGRAM OFFICER OF HUMAN SERVICES DEBORAH MAJEWSKI REFLECTS ON FY23

191
AWARDS MADE



\$11.8M
IN GRANTS AWARDED



To read headlines, reports, and statistics in isolation is to feel overwhelmed by the enormity of need in our communities. But to read grant applications from our human services partners and allocate resources, together with TLLF's team, is to see that our joint efforts can usher in lasting transformation. Because of the devotion of nonprofit workers, there is so much good happening in our region...and even more is yet to come.





UNDER THE UMBRELLA OF SHELTER

On average, **an adult trauma victim must go to nine separate locations, fill out 37 pages of paperwork, and repeat their story 27 times before receiving the resources** necessary to heal and move forward. Unsurprisingly, many give up.

In Charlotte, survivors will soon have the opportunity to write a new chapter in partnership with The Umbrella Center – the county’s first one-stop support hub for victims of violence, sexual assault, child maltreatment, human trafficking, and elder abuse.

Based on the nationally acclaimed Family Justice Center model, **The Umbrella Center will house a multi-disciplinary team of professionals comprised of 150 staff from 15 private and public agencies. TLLF has awarded \$1M in support of the project,** which is well underway.

Deborah says: “This Center is a transformational solution for abuse victims and will be a critical catalyst in ending the intergenerational transmission of violence, poverty, and homelessness in our community.”

191

GRANTS MADE

\$11,868,000

IN HUMAN SERVICES GRANTS AWARDED



MORE MOUTHS TO FEED

HEIGHTENED FOOD INSECURITY IN CHARLOTTE LEADS TO FOOD PANTRY EXPANSION



For over 40 years, Loaves & Fishes has served as a local safety-net provider, running the largest network of emergency food pantries in the Carolinas. Following its merger with nonprofit Friendship Trays, Loaves & Fishes / Friendship Trays facilitates the region's Meals on Wheels program for seniors. Now, Loaves & Fishes / Friendship Trays is expanding to a 90-thousand-square-foot facility where it can best meet future programmatic needs for a rapidly growing city.

This is vital, as **roughly 15% of households in Charlotte-Mecklenburg County were food insecure last year.** Deborah shares, "Loaves & Fishes / Friendship Trays is a best-in-class feeding agency in our portfolio because of its innovative programming and stellar leadership. This once-in-a-generation project is designed to reverse the effects of food insecurity in our community. We're proud to fund the development of the NourishMeck Hunger Hub."

MISSION MOMENT: HEALTHCARE

SENIOR PROGRAM OFFICER OF HEALTHCARE DR. MICHAEL RICHARDSON SHARES HIS FY23 HIGHLIGHTS

111
AWARDS MADE

\$15M
IN GRANTS AWARDED

Improving access to care is a key component of TLLF's healthcare mission. It's why we're so excited to partner with state leaders like El Futuro, a nonprofit founded to meet the significant need for Spanish-speaking mental health professionals in central North Carolina.

Our \$100K gift to this organization will help first- and second-generation immigrants ages 6 and up receive direct services like therapy and psychiatry. Thanks to El Futuro, Hispanic households are journeying toward stability and wholeness, receiving care designed with their needs in mind. Advancements in healthcare are important; affordable and equitable advancements are innovative.



BETTER TOGETHER

HIGHLY REGARDED NONPROFIT COLLABORATES TO KEEP FAMILIES INTACT IN WESTERN NORTH CAROLINA

At any given time, **there are 16,000 children in North Carolina's child welfare system.** The annual number of referrals to the state's foster care system far outpaces capacity to care for these young people.

Crossnore School & Children's Home is a top-tier collaborative child welfare and behavioral health organization serving children and families in crisis across 43 counties in western and central North Carolina.

A \$150K grant from TLLF will help Crossnore expand a locally-proven pilot of its Family Foundations program, which is an intensive, in-home service that uses a team-based approach to provide mental health treatment to children and adolescents ages 4-20.

These are children unable to remain stable in their communities without interventions due to chronic symptoms of emotional, behavioral, or substance use disorders.

THOMAS SMITH
DIRECTOR
PRESIDENT

CHEALSY WILLIAMS
VICE PRESIDENT

TLLF's funding will assist Crossnore in launching four new Family Preservation teams across the state.



111

GRANTS MADE

\$15,005,000

IN HEALTHCARE GRANTS AWARDED



COLLECTIVE IMPACT

STATEWIDE ASSOCIATION RECEIVES \$75K GRANT

Approximately 500,000 North Carolinians are uninsured. The NC Association of Free and Charitable Clinics (NCAFCC) aims to change this. The statewide network convenes 74 member clinics to serve roughly 80,000 of this uninsured population.

The NCAFCC promotes quality in its member clinics by providing training and technical assistance, public and donor relations, telemedicine, behavioral health, and dentistry. Its member **clinics' collective impact resulted in an estimated hospital emergency department diversion savings of over \$308M last year.** Notably, healthcare outcomes for NCAFCC clinics are similar to outcomes in commercial insurance care settings.

"TLLF's \$75K grant to NCAFCC is intended to make resources and healthcare interventions more readily available to vulnerable populations," shares Dr. Mike. "Of note, **TLLF also funds 25 of NCAFCC's member clinics** through separate grants. Minimizing duplication of services through streamlined care and training ultimately maximizes the support available to patients in need."



MISSION MOMENT: JEWISH VALUES

SENIOR PROGRAM OFFICER OF JEWISH VALUES JUSTIN STEINSCHIBER SHARES POIGNANT STORIES FROM FY23

58
AWARDS MADE



\$4.6M
IN GRANTS AWARDED



The guiding light of faith becomes especially poignant when the world seems uncertain. Now, more than ever, we see the relevance of Jewish values like Tzedakah (Charitable Giving), Kavod (Respect and Honor), Achrayut (Responsibility), and Tikkun Olam (Repair the World). It is a privilege to form partnerships with Jewish communities and organizations that are committed to sowing seeds of hope for generations to come.



RAMAH DAROM RECEIVES \$1M

SAFE HAVEN FOR JEWISH FAMILIES LOOKS TO THE FUTURE



Ramah Darom is a full-service retreat center that inspires a life-long love of Jewish values, tradition, and community by bringing youth, adults, and families together for immersive experiences in Jewish living and learning.

Studies consistently demonstrate that attending a Jewish summer camp has a significant effect on an individual’s enduring Jewish identity and community participation. To this end, Ramah Darom is expanding its offerings and updating affordability initiatives to enhance the camp and create post-secondary opportunities for camp alumni.

Says Justin: “TLLF’s \$1M investment in this capacity-building project will help Ramah Darom welcome Jewish people from all walks of life into warm and welcoming encounters with their Jewish heritage. **We know the impact of this will result in stronger Jewish communities throughout the Southeast and beyond.**”

58

GRANTS MADE

\$4,694,800

IN JEWISH VALUES GRANTS AWARDED



INVESTING IN THE GOOD & MAKING WAY FOR GREAT

There are **an estimated 14,000 Jewish people residing in Durham-Chapel Hill**. At a time when younger generations of Jews are increasingly abstaining from any religious affiliation (32% of millennials vs. <7% of baby boomers), local Federations serve as important conveners, mobilizing resources in support of Jews living safe and engaged Jewish lives.

Jewish For Good (the Federation of Durham-Chapel Hill) encompasses three major divisions: Jewish Family Services, the Jewish Community Foundation and the Levin Jewish Community Center.

Through its programming, Jewish For Good served nearly 9,000 individuals last year. To steward its growing community and increase programmatic capacity, the agency has launched a capital campaign. **In FY23, TLLF committed an additional \$500K to the project**, bringing the Foundation's total campaign investment to \$1M.

PRESERVING THE HOPE OF HOLOCAUST SURVIVORS

According to a 2021 study by the Jewish Federations of North America, approximately **115,000 Holocaust survivors reside in the U.S.** The study also estimates that **25% of survivors live at or below the poverty line**, struggling to meet basic needs for housing, food, and healthcare. The Holocaust Survivor Support Fund, convened by the Jewish Federation of Greater Atlanta, alleviates these financial burdens, serving as the main provider of assistance for survivors in the Southeast.

“It is an honor to dignify and care for Holocaust survivors in our region through a \$75K grant,” comments Justin. “Their stories of courage are powerful reminders to us all, and we are proud to amplify their voices.”



MISSION MOMENT: EDUCATION

SENIOR PROGRAM OFFICER OF EDUCATION JUSTIN STEINSCHRIBER
DISCUSSES TWO FY23 NONPROFITS THAT MADE THE GRADE



77
AWARDS MADE

\$3.9M
IN GRANTS AWARDED

The infographic features a dark blue square with the number '77' and the text 'AWARDS MADE' below it. To its right is a photo of two young boys sitting at a desk, looking at a book. Below the '77' square is a larger brown square with '\$3.9M' in large blue font and 'IN GRANTS AWARDED' in smaller blue font below it. To the right of the '\$3.9M' square is a portrait of Justin Steinschriber, a man in a dark suit and purple tie, smiling.

The scope of TLLF’s work in the education space is broad, and rightly so. Our team feels the weight of responding to K-12 and post-secondary needs in the Carolinas because every dollar committed is a dollar that shapes the lives of our future leaders.

This portfolio is filled with multifaceted, data-informed projects that are making pathways to self-sufficiency for marginalized youth. We know that a vibrant academic career begins at home, and we’re doing our best to cultivate holistic, family-centered interventions for the region’s bright young minds.



BUILDING BLOCKS OF LITERACY

CHARLOTTE NONPROFIT HELPS FAMILIES TURN A NEW PAGE



Research of the developing brain shows that **80% of brain growth happens before the age of three**; and yet, the majority of low-income children in the Carolinas cannot read proficiently by the time they reach 3rd grade. This is due, in part, to their limited exposure to early childhood education in their formative preschool years.

When leadership at Reach Out and Read-Carolinas (RORC) realized that over 90% of children will visit their medical providers at least once per year, they saw the potential for a happier ending to this narrative.

RORC hit the books to create a medical, clinic-based literacy intervention that 1) equips trained medical providers to prescribe reading strategies and encouragement, and 2) builds home libraries in low-income households by giving every child a book at each visit.

Data shows that RORC parents are 2.5x more likely to read to their children, and their children's language development improved by 3-6 months when compared to that of their peers. Justin says, "If we wait until elementary school to address the achievement gap, our region's students will not be set up to succeed. Research tells us we need evidence-based input starting from day one, and RORC's outcomes support this philosophy. TLLF is proud to be an annual funder of RORC's work, with our FY23 investment totaling \$105K."

77

GRANTS MADE

\$3,977,000

IN EDUCATION GRANTS AWARDED



CREATING GREATER EXPECTATIONS

BOYS & GIRLS CLUBS TEACHES YOUTH TO DREAM BIG

In the Lowcountry of South Carolina, **1 in 4 students will not graduate from high school, and 1 in 5 is living in poverty.** However, studies suggest that socio-emotional and academic supports can mitigate negative outcomes and help students push past barriers to achievement.

With the help of the Boys and Girls Club of the Lowcountry (BGCL), nearly 1,000 students are making strides toward personal wins both in and out of the classroom. BGCL offers accessible and affordable after-school and summer resources at nine sites across the region, and the presence of caring, engaged mentors and educational resources is changing lives. Last year alone, 95% of participating youth advanced to the next grade level.

“As programming continues to stabilize in the years following the Covid-19 pandemic, we know that BGCL’s reach will become even more prolific,” comments Justin. “As of now, TLLF funds 11 different Boys & Girls Club entities spanning the Carolinas, and the Lowcountry contingent is best-in-class, receiving \$100K from TLLF in 2023.”



WELCOMING NEW FACES

TWO FY23 ADDITIONS ADVANCE TLLF'S PHILANTHROPIC WORK



Gillian Small

PROGRAM OFFICER, EDUCATION

As a Program Officer, Gillian evaluates grant proposals, conducts program research, and identifies new grant opportunities in the Education mission area. She joined TLLF after working as an 8th-grade teacher and nonprofit leader in the Charlotte community. She earned her Bachelor of Arts in Political Science from Furman University and her Master of Education from American University. She and her partner, Avery, enjoy hiking with their dog, baking, and traveling.



Jacob Wiltshire

PROGRAM OFFICER, HEALTHCARE

Jacob joined the Foundation in 2022 after spending 13 years in fundraising for non-profits and universities and four years working as a Licensed Clinical Social Worker in healthcare. Born in Asheville, North Carolina, he earned his Bachelor of Arts in Journalism from the University of North Carolina at Chapel Hill and his Master of Social Work from the University of North Carolina at Charlotte. He and his partner, Amy, enjoy hiking, live music, and traveling.

BOARD APPOINTS NEW DIRECTORS

ESTEEMED LOCAL LEADERS JOIN TEAM LEVINE

Arrington Mixon is a civic leader and former member of TLLF’s senior staff. Prior to joining TLLF’s team, she held executive roles with Bank of America, enjoying a successful career in Corporate and Investment Banking and Risk Management. She retired from TLLF in 2018 and now serves as a Director and Audit Committee Chair of TIAA Bank as well as a Trustee and Audit Committee Chair of North Carolina Management Trust. Arrington also chairs the Governing Board of Directors and the Investment Committee of Foundation For The Carolinas.



Arrington Mixon
DIRECTOR, TLLF BOARD

Michael Marsicano has a vibrant, longstanding relationship with TLLF as a philanthropic leader and convener, most recently during his tenure as President and CEO of Foundation For The Carolinas (FFTC). Under his guidance, FFTC became the fifth-largest community foundation in the U.S., with FFTC-held funds exceeding \$7 billion and grants awarded to nonprofits totaling over \$4.5 billion. He retired from FFTC in 2023.



Michael Marsicano
DIRECTOR, TLLF BOARD

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