William R. Kenan, Jr. Charitable Trust ANNUAL REPORT OF THE TRUSTEES

FY 2018

Believing in Places of Promise

or a growing number of Americans, achieving the American Dream happens only while they are asleep. While there has always been economic disparity in America, the gap between the rich and the poor began widening in the 1970s and has accelerated at an alarming rate. According to the Institute for Policy Studies, America's top 10 percent now average more than nine times as much income as the bottom 90 percent. Paths to prosperity are few and far between, and without the resources to improve one's circumstances, hope is slipping away for these underserved individuals, especially those in rural communities.

In medicine, the consummate health care provider learns that every patient is different. An individual is not her illness; rather, her health is the result of a complex mix of genetic and environmental factors, social support networks, and the ability and resources to access medical services. The same is true of doing work in impoverished communities. While the challenges facing these neighborhoods are often grounded in the same root causes, each community faces a unique set of circumstances and requires efforts that are sensitive, genuine, and empathetic.

One of the most inspiring and promising places where this community-focused approach is working is in Louisville, Kentucky. Through an initiative called Russell: A Place of Promise, the Kenan Charitable Trust has learned about the historical precedents and current landscape of the Russell neighborhood, and is honored to support the vision and work of individuals and organizations committed to its future. Due to raciallybased redlining of poor neighborhoods, the unjust state of the criminal justice system, the placement of major road systems through low-income neighborhoods and other oppressive factors, formerly vibrant communities have been methodically robbed of vitality. As the great Rev. William Barber, the current leader of the Poor People's Campaign, stated "we can never know the ecstasy of true hope without attending to the tragic realities of the poor and forgotten..." America has gone from the War on Poverty to the present day War on the Poor.

The Russell project brings together community activists and government leaders, people of faith and corporate sponsors, private funders and philanthropic partners. The goal is to revitalize Russell for the benefit of its current residents with improvement and not displacement. In its heyday Russell was known as the Harlem of the South. If this project is brought to fruition, the community could once again embody a spirit of self-sufficiency, opportunity and pride and serve as a template for other struggling neighborhoods across America.

In addition to the meaningful and ambitious efforts underway in Russell, the Kenan Charitable Trust continues its work in the areas of education, health care, and the arts in New York, North Carolina, Kentucky and Florida. Guided by a commitment to improving lives, we embark on every collaboration in the most empathetic, passionate, judicious, impactful, and grantee-related way possible. We are grateful and privileged to work with so many dedicated individuals in the nonprofit sector. They are our mentors!

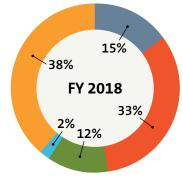
FY 2018 Funding Partnerships

uided by the mission of improving lives by helping and educating people, the Trustees of the William R. Kenan, Jr. Charitable Trust awarded more than 180 grants in fiscal year 2018. The Trust's primary portfolios-education, arts, criminal justice, and rural health-were complemented by a commitment to investing in aspiring communities without displacement in African-American neighborhoods. Nowhere is this more prominent than in the community-focused, all-embracing Russell: A Place of Promise initiative, the centerpiece of the Trust's giving in 2018. Examining historical significance and the present landscape of this neighborhood, and others, strengthened the organization's long-established beliefs in places of promise.

The Trust's two largest areas of funding focus supported "B-12" (children from birth through all 12 grades) and whole community health, with grants totaling roughly \$11 million respectively. Other areas of focus were positioned to support higher education, and arts and culture, as well as longstanding family interests and historic preservation.

Childhood programs and educational initiatives continued to take center stage, echoing what William R. Kenan, Jr. stated in his Will, that "education is the most cherished gift an individual can receive." This axiom is taken to heart in all the Trust's endeavors, giving hosts of low-income, disadvantaged children and families hope for the future by providing often unique educational opportunities.

During FY 2018, while more than \$11 million of the Trustees' grants supported B-12, over \$3 million was designated for higher education initiatives, including student scholarships, enhancement of program infrastructures and technology, and providing support for teachers by creating new outreach and research opportunities.



Embracing the time-honored strategy and mission of improving lives by helping and educating people, the Kenan Charitable Trust awarded numerous grants in FY 2018 within the concept of believing in the promise of place.

\$3,160,000 Arts and Culture

\$10,510,000 Birth-12th Grade

\$3,230,000 **Higher Education**

\$625,000 Historic Preservation/Other

\$11,330,000 Whole Community Health

\$28,855,000 Total Disbursement FY 2018



Trustees of the William R. Kenan, Jr. Charitable Trust at Liberty Hall, the 1830 home of William R. Kenan, Jr.'s grandfather, in Kenansville, N.C. From left: Thomas S. Kenan III of Chapel Hill, North Carolina; Mary G. Campbell of New York, NY, Managing Director representing corporate trustee JPMorgan; James G. Kenan III of Lexington, Kentucky; and Robert P. Baynard of New York, NY, Vice Chairman representing corporate trustee JPMorgan.

The funding area of Whole Community Health was a more visible and viable concentration than ever, encompassing basic human needs, physical and mental health, and the general well-being of the often underserved and sometimes homeless families, with grants totaling more than \$11 million in FY 2018. The Trustees renewed annual grants to nine food banks in the states of Florida, Kentucky, North Carolina and New York, as well as provided support for emergency disaster relief in other areas.

Grants awarded to Arts and Culture projects accounted for more than \$3 million of the Trustees' grantmaking in FY 2018, funding a diverse range of fruitful projects and collaborative initiatives, including support for educational community programs as well as innovative art exhibits at public schools and institutions of higher learning.

In addition, the Trustees awarded grants to support productive projects and initiatives that fall outside of the traditional parameters, accounting for more than \$600,000 in 2018. While the Trustees partner with organizations and institutions across the nation, they align their grantmaking priorities in the four key states of North Carolina, Kentucky, Florida and New York. The majority of the grants in FY 2018 supported programs in one of, or a combination of, these four states. Nevertheless, the Trustees venture outside these limitations to signify their support for the vision and work of individuals and organizations committed to improving lives.

W.R. Kenan, Jr. Professorships ACADEMIC YEAR

Established in 1966, the current market value of the endowed professorships is more than \$480 million. In the 2017-18 academic year, the endowments funded 126 William R. Kenan, Jr. Professorships at 56 institutions.

Agnes Scott College John F. Pilger Department of Biology

Amherst College Jyl Gentzler Department of Philosophy (Vacant)

Bowdoin College Thomas Baumgarte Department of Physics

John C. Holt Department of Religion Jennifer Scanlon Department of Gender and Women's Studies

Brandeis University David H. Roberts Department of Astrophysics

Brown University Richard W. Kenyon Department of Mathematics

Bryn Mawr College Victor J. Donnay Department of Mathematics

California Institute of Technology Morgan Kousser Department of History and Social Sciences

Carleton College

Sam Patterson Department of Mathematics Neil Lutsky Department of Psychology

The Claremont Colleges John G. Milton Keck Science Department Claremont McKenna, Pitzer, and Scripps Colleges

Colby College Tanya R. Sheehan Department of Art

Colgate University Adam Burnett Department of Geography Ellen Percy Kraly Department of Geography

College of William and Mary Francie Cate-Arries Modern Languages & Literature Melvin P. Ely Department of History

Christopher MacGowan Humanities & English Adam S. Potkay Department of English Columbia University*

Lawrence A. Chasin Department of Biological Sciences Liang Tong Department of Biological Sciences

Cornell University Barbara L. Finlay Department of Psychology

Dartmouth College* Paul Christesen Department of Classics Department of French and Italian

Davidson College John Wertheimer Department of History Drew University Jonathan E. Rose Department of History

Duke University Michael Therien Department of Chemistry

Emory University Douglas A. Hicks Department of Religion John Lysaker Philosophy Robert N. McCauley Department of Philosophy

Furman University A. Scott Henderson Department of Education Gilles O. Einstein Department of Psychology James Lee Guth Department of Political Science

Hamilton College Richard Bedient Department of Mathematics Margaret Gentry Department of Women's Studies

Harvard University* Marjorie Garber Departments of English and of Visual and Environmental Studies John T. Hamilton Departments of Comparative Literature and of Germanic Languages and Literature Harvey C. Mansfield Department of Government Daniel L. Schacter Department of Psychology

Haverford College Deborah H. Roberts Department of Classics and Program in Comparative Literature

Johns Hopkins University* Marc Kamionkowski Department of Physics & Astronomy

Lehigh University Michael D. Santoro College of Business and Economics

Massachusetts Institute of Technology Heather Paxson Department of Anthropology

Middlebury College Molly D. Anderson Department of Food Studies Jeffrey Dunham Department of Physics

Mount Holyoke College Katherine Binder Department of Psychology

New York University Finbarr Barry Flood Institute of Fine Arts and Department of Art History

Northwestern University Eddie Dekel Department of Economics Robert H. Porter Department of Economics Princeton University

M. Christine Boyer School of Architecture Sanjeev R. Kulkarni Dept. of Electrical Engineering

Reed College Lisa M. Steinman Department of English Literature and Humanities

Rollins College (Vacant)

Smith College Michael Thurston Department of English

Stanford University Robert L. Byer Department of Applied Physics Steven Chu School of Medicine

Stetson University Eugene Huskey, Jr. Department of Political Science

Swarthmore College Peter J. Schmidt Department of English Literature Kenneth Sharpe Department of Political Science

Syracuse University Cristina Marchetti Department of Physics

Trinity College Robert J. Corber American Institutions and Values: Women, Gender and Sexuality

University of Chicago* David Jablonski Department of the Geophysical Sciences, Committee on Evolutionary Biology, and The College Judith T. Zeitlin Department of East Asian Languages and Civilizations

University of Florida John F. Stanton Department of Chemistry

University of North Carolina at Chapel Hill Albert S. Baldwin, Jr. Lineberger Cancer Center and Department of Biology James D. Beck Department of Dental Ecology and Department of Epidemiology Kim Brouwer School of Pharmacy John M. Conley School of Law Joseph M. DeSimone Department of Chemistry Michael Emch Department of Geography Carl Ernst Department of Religious Studies Liesbet Hooghe Department of Political Science James H. Johnson, Jr. Kenan-Flagler Business School James W. Jorgenson Department of Chemistry Michael Kosorok Department of Biostatistics

Steven Offenbacher** Department of Periodontology John V. Orth School of Law Herbert Peterson School of Public Health Barry Popkin Gillings School of Public Health Matthew R. Redinbo Department of Chemistry Alan Shapiro Department of English Jessica Smith School of Government Koji Sode Dept. of Biomedical Engineering **Richard J. A. Talbert** Department of History Michael E. Taylor Department of Mathematics Jenny Pan-Yun Ting Department of Microbiology and Immunology Yue Xiong Department of Biochemistry Mark J. Zylka Dept. of Cell Biology & Physiology

University of Notre Dame Valerie Sayers Department of English Christian Smith Department of Sociology

University of Pennsylvania

Jere R. Behrman Department of Economics Jeffrey Kallberg Department of Music E. Ann Matter Department of Religious Studies and Department of Italian Studies

University of Rochester (Vacant)

University of the South (Sewanee) John Joseph Gatta, Jr. Department of English

University of Virginia

Paul N. Adler Department of Biology Benjamin K. Bennett Department of Germanic Languages and Literatures Rae L. Blumberg Department of Sociology Jenny S. Clay Professor of Classics Rita Felski Professor of English Gerald P. Fogarty Department of Religious Studies Jagdish Krishan Kumar Department of Sociology Kevin K. Lehmann Department of Chemistry Jon. D. Mikalson Classics Jeffrey K. Olick Department of Sociology Brooks H. Pate Department of Chemistry Andrea L. Press Department of Media Studies and Sociology Judith Shatin

Department of Music

Anthony C. Spearing Department of English Language and Literature Karen Van Lengen School of Architecture Peter D. Waldman School of Architecture

Vanderbilt University*

Celia Applegate Department of History Jay Clayton Department of English Cindy Kam Department of Political Science David E. Lewis Department of Political Science Calvin F. Miller Department of Earth and Environmental Sciences

Vassar College Sarah R. Kozloff Department of Drama and Film

Wake Forest University Julian P. Young Department of Philosophy

Washington and Lee University William L. Patch Department of History

Wellesley College Charles Bu Department of Mathematics Guy M. Rogers Departments of History and Classical Studies

Wesleyan University* Clark Maines Department of Art and Art History Joseph Siry Department of Art and

Art History

Williams College Lee Y. Park Department of Chemistry David P. Richardson Department of Chemistry

Wofford College Christine S. Dinkins Dept. of Philosophy

Yale University* Michael Denning American Studies Program; Program in Ethnicity, Race, and Migration; Department of English Language and Literature Lawrence G. Manley Department of English Language and Literature (Vacant)

* Denotes institutions that also received special grants prior to 1978 to support the development of innovative teaching programs.

** Steven Offenbacher, W.R. Kenan, Jr. Distinguished Professor and former chair of the Department of Periodontology, passed away in August 2018.

Grantees FY 2018

15,000 Degrees Louisville, KY **\$100,000** ► Increase in college graduation

Alice Lloyd College Pippa Passes, KY \$100,000 ► General operating

Alvin Ailey New York, NY \$150,000 ► Expansion into four tour workshop cities

America Needs You New York, NY \$100,000 ► General operating

American Spiritual Ensemble Lexington, KY \$50,000 ► Endowment

AMPED Louisville, KY \$50,000 ► Creative programming expansion

Asheville Art Museum Asheville, NC \$100,000 ► Capacity building and audience development

Asia Society New York, NY \$50,000 ► Center for Global Education

BARD Prison Initiative (BPI) Annandale on Hudson, NY \$100,000 ► BPI Reentry Team capacity building

Bedford-Stuyvesant Restoration Corporation New York, NY \$75,000 ► Cultural & Ideas festival

Benevolence Farm Graham, NC \$30,000 ► To support launch of initial program operation

Black Male Working Academy (BMW) Lexington, KY \$100,000 ► Enrichment program for boys of color

Bluegrass Community Foundation Lexington, KY \$160,000 ► Staff capacity building

Bluegrass Land Conservancy Lexington, KY \$100,000 ► General operating

BMe

Louisville, KY \$300,000 ► South Florida office and platform to 30 BMe leaders, 60 champions and 5 media outlets

\$100,000 ► Black male network in Louisville

Book Harvest Durham, NC \$100,000 ► Book Babies

Bowery Residents Committee (BRC) New York, NY \$700,000 ► Horizons workforce program

Boys and Girls Club of Puerto Rico San Juan, PR \$150,000 ► Hurricane Maria Impact Fund

BUILD New York, NY \$200,000 ► General operating

Bronx Defenders New York, NY \$135,000 ► Foster-care families at risk

Brooklyn Academy of Music Brooklyn, NY \$75,000 ► Social justice programming

Brooklyn Museum Brooklyn, NY \$275,000 ► Community organizing and education

Brotherhood Sisters Sol New York, NY \$100,000 ► General operating

Camelback Ventures New Orleans, LA \$100,000 ► Social innovation program

Caridad Center Boynton Beach, FL \$100,000 ► Organizational expansion

Carnegie Center of Literacy Lexington, KY \$50,000 ► Creative learning expansion

Child Development Center of the Bluegrass Lexington, KY \$50,000 ► General operating

Children's Advocacy Center of the Bluegrass Lexington, KY \$50,000 ► General operating

Children's Healing Institute West Palm Beach, FL \$100,000 ► Program expansion to serve 20-35 high-risk families

Chrysalis House, Inc. Lexington, KY \$100,000 ► Residential treatment services

\$50,000 ► General operating

Cities United Louisville, KY \$200,000 ► Thrive Fellowship \$50,000 ► Louisville: Promise of Place convening

City Harvest New York, NY \$100,000 ► General operating

Columbia University New York, NY \$125,000 ► Social justice and arts program

Community Food Bank of New Jersey Hillside, NJ \$100,000 ► General operating

Community Justice Project Miami, FL \$75,000 ► Support for marginalized communities

Cristo Rey New York High School New York, NY \$100,000 ► Growth of the college counseling office

#Cut50, dba Dream Corps Oakland, CA **\$100,000** ► Compassionate sentencing campaign

Davidson College Davidson, NC \$100,000 ► Student fellowships to address critical social issues

DigiLearn Raleigh, NC \$75,000 ► Three new digital scholars

District C Chapel Hill, NC \$50,000 ► Teachers coaching institute

The DOOR New York, NY \$200,000 ► General operating

DREAM (formerly Harlem RBI) New York, NY \$500,000 ► Enrichment and high school support

Dream Defenders San Francisco, CA \$75,000 ► To replicate alternative justice model

Duke University Durham, NC: American Ballet Theater Residency \$50,000 ► 3-year Residency Bull City 150 \$50,000 ► Housing and education inequity programming In Honor of Dr. Richard Brodhead \$250,000 ► Expansion of Brodhead's work to fund student engagement (DukeEngage)

School of Divinity \$50,000 ► Duke Initiatives in Theology & the Arts (DITA) World Food Policy Center \$600,000 ► General operating

Durham Habitat for Humanity

Durham, NC \$100,000 ► Home ownership and tiny home programs

Eagle Academy Foundation New York, NY \$250,000 ► College Success and Career Readiness

EducationNC

Raleigh, NC \$50,000 ► Exploration of challenges and opportunities for adolescents in communities across North Carolina

\$100,000 ► NC Center for Public Policy

Education Leaders of Color (EdLoc) Whittier, CA \$100,000 ► Boulder Fund Education Program

Equal Justice Initiative Montgomery, AL \$100,000 ► History of racial injustice dialogue \$50,000 ► General operating

El Sol Jupiter, FL \$50,000 ► To develop a comprehensive grant request strategy for future submission

Essie Project Oakland, CA \$100,000 ► To support program expansion to North Carolina, Kentucky, and Florida

Estella's Brilliant Bus, A Class Act Learning Center Miami, FL \$125,000 ► To secure core administrative staff to support and expand services

Farmworker Coordinating Council of Palm Beach Lake Worth, FL \$50,000 ► People in Need program

Feeding South Florida Pembroke Park, FL \$100,000 ► General operating

Flagler College St. Augustine, FL \$100,000 ► 50th Anniversary book

Focused Ultrasound Charlottesville, VA \$150,000 ► General operating

Food Bank of Central & Eastern NC Raleigh, NC \$100,000 ► General operating



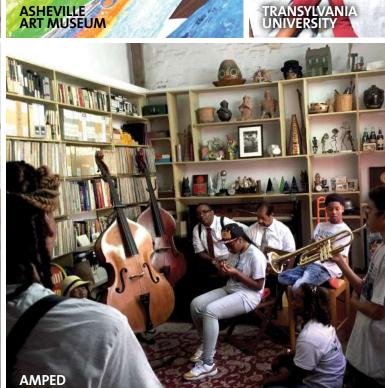






RONDO FOUNDATION/ RUSSELL PROJECT









ACHIEVE

88





FAYETTE COUNTY SCHOOLS

Food Bank for New York City New York, NY \$100,000 ► General operating

Food Bank of Western New York Buffalo, NY \$100,000 ► General operating

Forward Cities Durham, NC \$75,000 > Learning platform and a convening strategy, building capacity and an evaluation framework within participating North Carolina communities

Foundation for Appalachian Kentucky Hazard, KY \$85,000 ► To support affordable childcare programs in SE Kentucky

The Foundation Center Washington, DC \$25,000 ► Annual program support

Future Project New York, NY \$100,000 ► Dream Fund

God's Pantry Food Bank Lexington, KY \$100,000 ► General operating

Greater Houston Community Foundation Houston, TX \$100,000 ► Hurricane Harvey relief

Harlem Children's Zone New York, NY \$150,000 ► GEMS preK capacity building

Harvard Kennedy School of Government – The Center for Public Leadership Cambridge, MA \$400,000 > Latino graduate fellowship

Healthy Girls Save the World Chapel Hill, NC \$25,000 ► Program expansion

Henderson Collegiate Charter School Henderson, NC \$150,000 ► 1:1 program and AP science

H.O.L.L.A. New York, NY \$50,000 ► Healing Justice Youth Development

iCivics Cambridge, MA \$125,000 ► Spanish game translation

Inner City Innovators West Palm Beach, FL \$40,000 ► Organizational capacity enhancement

Island Harvest Mineola, NY \$100,000 ► General operating

Jamie Kirk Hahn Foundation Raleigh, NC \$50,000 ► Equity fellowship program Johnson C. Smith University Charlotte, NC \$555,000 ► Stem Innovation Initiative

Kappa Apha Psi Foundation Philadelphia, PA \$75,000 ► Mentor-mentee support groups

KidzNotes Durham, NC \$50,000 ► 200 new KidzNotes musicians

Kidzu (Chapel Hill Carrboro Children's Museum) Chapel Hill, NC \$75,000 ► Planning grant

KIPP ENC Foundation Gaston, NC \$250,000 ► General operating, Halifax, NC site

The Laundromat Project New York, NY \$125,000 ► Expansion of artist development, arts education and community programs

Lexington/Fayette County Government Lexington, KY \$200,000 ► COACH Fellowship

Lexington Leadership Foundation Lexington, KY \$250,000 ► Campaign of the Future

The Lexington School Lexington, KY \$50,000 ► General operating

Lincoln Center Education New York, NY \$40,000 ► To expand community engagement efforts

Lincoln Center Jazz New York, NY \$100,000 ► Middle School Jazz Academy

Living Cities New York, NY \$150,000 ► General operating

Long island Cares Hauppage, NY \$100,000 ► General operating

The Lord's Place West Palm Beach, FL \$100,000 ► To expand organizational capacity and program support for Halle Place for justice-involved women

Louisville Metro Government Louisville, KY \$400,000 ► Thrive Fellowship

Louisville Metro Government with Community Foundation of Louisville Louisville, KY \$1,300,000 ► Russell, Place of Promise project Louisville Urban League

Louisville, KY \$100,000 > Workforce Development \$150,000 > LUL's Center for Workforce Development \$150,000 > Russell, Place of Promise initiative

MACED Berea, KY \$100,000 ► Expand regional entrepreneurial capacity

Maureen Joy Charter School Durham, NC \$175,000 ► Literacy outcome improvement

MDC, Inc. Durham, NC \$100,000 ► Benefit Bank of North Carolina

Memorial Presbyterian Church St. Augustine, FL \$400,000 ► Renovation and maintenance \$50,000 ► Challenge grant

Metro United Way Louisville, KY \$125,000 ► Black Male Achievement Blueprint

Metro United Way/University of Louisville/CBMA Louisville, KY \$200,000 ► Black Male Achievement Leaders

The Metropolitan Museum of Art

New York, NY \$500,000 ► Establishment of artist residency program with established and emerging artists

Millsaps College Jackson, MS \$100,000 ► Support for the Kenan Scholars program focusing on Piney Woods School students

Montpelier Foundation Montpelier Station, VA \$50,000 ► U.S. Constitution survey

The Mountain School Vershire, VT \$150,000 ▷ Scholarships for underprivileged students

Movement of Youth Durham, NC \$150,000 ► Expansion to new states, with goal of being in 20 states by the year 2020

MyClinic Jupiter, FL \$50,000 ► Debt reduction associated with purchase of permanent facility

National Cares Mentoring

New York, NY \$200,000 ► Mentoring program expansion National Center for Families Learning Louisville, KY \$80,000 ► Planning grant with Frontline Solutions

National Chorale New York, NY \$50,000 ► Endowment

National Dance Institute New York, NY \$100,000 ► Support for DREAM project

National Tropical Botanical Garden Kalaheo, HI \$50,000 ► General operating: National Breadfruit Institute \$50,000 ► Hurricane Irma relief

Neighborhood Associates Corporation Washington, DC \$115,000 ► Community-based art program in North Carolina, Kentucky, and Florida

New Legacy Re-entry Corps Louisville, KY \$50,000 ► Thrive Fellowship

New York Public Library Schomburg Center New York, NY \$50,000 ► Schomberg Center programs

NC Arts in Action Durham, NC \$100,000 ► General operating

NC Institute of Minority Economic Development Durham, NC \$75,000 ► Support to stem drop-outs of HBCUs and develop a leadership pipeline

NC Museum of Art Foundation Raleigh, NC \$100,000 ► Three prototyped programs that offer educational opportunities that respond to identified key needs \$400,000 ► Museum Director Endowment Fund

NC Symphony Raleigh, NC \$100,000 ► Accessible and inclusive programming

Northeast Academy for Aerospace & Advanced Technologies (NEAAAT) Elizabeth City, NC \$300,000 ► Match for expansion

NYC Common Pantry New York, NY \$100,000 ► Emergency food provisions, supplemental social services and nutrition education to New York's homeless and low-income families

NYC First New York, NY \$200,000 ► General operating STEM education program







Î



ALICE LLOYD COLLEGE





AMERICAN SPIRITUAL ENSEMBLE



SMOKETOWN FAMILY WELLNESS CENTER NYC SALT New York, NY \$75,000 ► College prep program expansion

Operation Home North Charleston, SC \$50,000 ► General operating

Orange County Family Success Alliance Hillsborough, NC \$100,000 ► FSA Navigator Program

Orange County Rape Crisis Center Chapel Hill, NC \$70,000 ► English and Spanish services

Our Children's Place Chapel Hill, NC \$80,000 ► Professional trainings and Parent Days

Partnership for Appalachian Girls' Education (PAGE) Durham, NC \$140,000 ► Capacity building program \$100,000 ► Education literacy initiative

Partnership for After School Education (PASE) New York, NY \$100,000 ► Toolkit development

Patriot Foundation Pinehurst, NC \$100,000 ► General operating

Penland School of Craft Penland, NC \$100,000 ▷ Career Pathways partnership with UNCSA

Pensole Design Academy Portland, OR \$100,000 ► Career pathway in North Carolina, New York, Florida, and Kentucky

Portlight Strategies Charleston, SC \$50,000 ► Hurricane Harvey relief

POSSE Foundation Washington, DC \$200,000 ► Organizational capacity expansion

Profound Gentlemen Charlotte, NC \$100,000 ► Support for 150 male teachers of color in North Carolina

PTA Thrift Shop Carrboro, NC \$100,000 ► YouthWorx on Main

Reach Out and Read Boston, MA \$135,000 ► Growth and program expansion

ReCity dba The Hope Project Live Love Serve Durham, NC \$80,000 ► Sustainability, organizational and staff building Sadie Nash Leadership Project New York, NY \$50,000 ► Summer Leadership Institute

The Safe Haven Community Resource Center dba Live Fresh Miami, FL \$125,000 ► Live Fresh Affiliate chapters

Salvation Army Lexington, KY \$50,000 ► General operating

Salvation Army of Lockport Lockport, NY \$50,000 ► Youth programs and soup kitchen

School Justice Project Washington, DC \$75,000 ► Special education legal services programming

SEED Miami
Miami, FL
\$150,000 ► Hurricane relief for
students
\$100,000 ► General operating,
Hurricane Irma relief

Self-Help Credit Union Durham, NC \$350,000 ► RISE expansion in East Durham

Sewanee-University of the South Sewanee, TN \$50,000 ► Civic engagement expansion

Smoketown Family Wellness Center Louisville, KY \$100,000 ► Innovative healthcare module

Solomon R. Guggenheim Museum New York, NY \$80,000 ► Social Practice fund

Southern Documentary Fund Durham, NC \$100,000 ► Support for the Beautiful Project

Southeast Raleigh Promise Raleigh, NC \$400,000 ► To secure a land trust without displacement

STEM From Dance New York, NY **\$75,000** ► Expansion into New York City schools

Student U Durham, NC \$1,000,000 ► Leadership innovation lab

StudentsCare Miami, FL \$80,000 ► Program expansion to seven hospitals/healthcare facilities and three new sites, Support for long-term pediatric patients and families **Studio Museum in Harlem** New York, NY **\$100,000 ►** *In Harlem* program expansion

Theta Omega Inc. Louisville, KY \$200,000 ► Men of Quality headquarters

Thomas Armour Youth Ballet Miami, FL \$50,000 ► Arts and academic program expansion

Thomas Mentor Leadership Academy Durham, NC \$75,000 ► Comprehensive mentoring program

Transcend Education Hastings on Hudson, NY \$150,000 ► nXu high school development

Transylvania University Lexington, KY \$50,000 ► General operating

Turnaround for Children New York, NY \$75,000 ► Expansion of five New York City schools

University of North Carolina at Chapel Hill Chapel Hill, NC: Ackland Art Museum \$125,000 ► Marketing campaign

launch Chancellor's Science Scholars Program \$2,000,000 ► STEM Scholarships

for underserved students College of Arts & Sciences

\$100,000 ► Graduate student fellowships

Institute for Arts & Humanities \$50,000 ► Faculty Fellows program

Institute of Politics \$50,000 ► Dedicated campus student space

Morehead Planetarium \$100,000 ► STEM outreach and engagement

Parr Center for Ethics \$50,000 ► National High School Ethics Bowl

Rural Interprofessional Health Initiative (RIPHI) \$500,000 ► Rural clinic health initiative

Scholars Latino \$100,000 ► Latinx student program Thomas Ross Leadership Program

\$50,000 ► Graduate/Undergraduate leadership program

University of North Carolina School of the Arts Winston-Salem, NC: \$200,000 ► Marketing capacity expansion for fundraising \$100,000 ► BCG Consulting engagement/messaging **\$50,000** ► Happy Hill Arts neighborhood engagement

University of Florida Foundation-Computer Science Dept. Gainesville, FL \$400,000 ▷ Support for creation of the Center for Societal Impact through Community Engagement in Information Technology (SICE-IT)

University of Mount Olive Mount Olive, NC \$50,000 ► Duplin County Schools/ James Sprunt Community College

collaboration University of the Cumberlands Williamsburg, KY \$50,000 ► General operating

Urban Arts Partnership New York, NY \$100,000 ► English proficiency program

Urban Ministries Durham, NC \$50,000 ► Workforce education program/clinical placement

Urban Word New York, NY \$50,000 ► NYC Youth Poet Laureate program

Village of Wisdom Durham, NC \$75,000 ► Parent support and advocacy program

Walking Classroom Chapel Hill, NC \$75,000 ► 65 class sets and Fayette County, KY pilot program

we are (working to extend anti-racist education) Durham, NC \$50,000 ► Program expansion, Durham Public Schools

The Weeksville Heritage Center New York, NY \$75,000 ► Cultural program expansion

West End School Louisville, KY \$200,000 ► Expansion of West End School

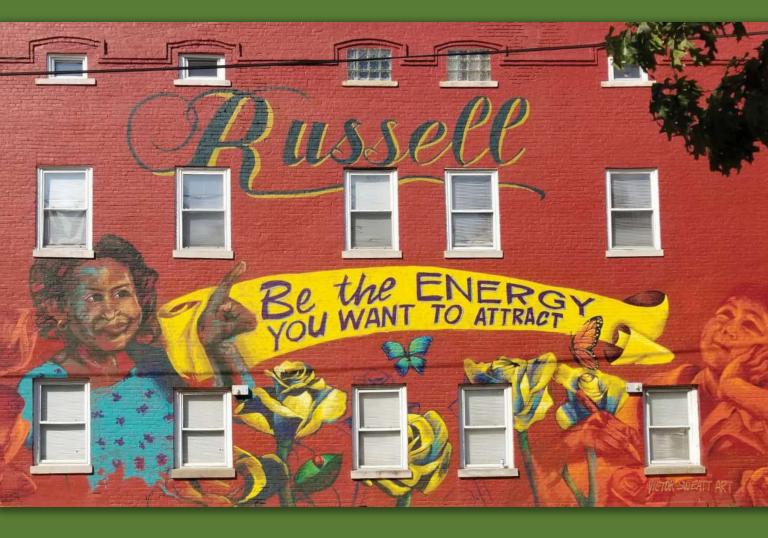
YES Prep Houston, TX \$100,000 ► Hurricane Harvey relief

YMCA Triangle

Raleigh, NC \$500,000 ► Facilities construction and strategic operating support of Southeast Raleigh's YMCA collective impact effort in partnership with PAVE SE Raleigh.

All photos unless credited have been provided by respective institutions. William R. Kenan, Jr. Charitable Trust PO Box 3858, Chapel Hill, NC 27515





William R. Kenan, Jr. Charitable Trust

BELIEVING IN THE PROMISE OF PLACE





A report on the W.R. Kenan, Jr. Charitable Trust's primary philanthropic focus

By Bridget Booher

"

The Kenan Trust believes that communities like Russell are their own greatest assets. The Trust's approach to grant making is not about funding specific programs for a few years, it's about listening to folks share where they have been and where they want to go, and then joining them as partners in that vision. It's about dismantling the forces perpetuating poverty and inequality in order to create a new ecosystem of social mobility, wealth creation, and selfsufficiency so that individuals can become the heroes and heroines leading the change in their own communities."

—Kenan Charitable Trust

Cover: An inspirational mural on the corner of 16th and Muhammad Ali Boulevard, painted by Louisville artist/art activist, Victor Sweatt. Photo courtesy Victor Sweatt.

RUSSELL | A Place of Promise

n its heyday, Louisville's Russell neighborhood was a lively, thriving community. Ella Fitzgerald, Sarah Vaughan and other jazz greats played at the Top Hat Club. Western Library, the first full-service library in the nation run by and for African Americans, bustled with lifelong learners of all ages. Along its busy Walnut Street corridor, hundreds of African-American businesses, restaurants, and theaters created a vibrant economic and cultural landscape, and earned the area the sobriquet "the Harlem of the South."



Clockwise: The Top Hat Club at 13th and Walnut Street. Looking west down old Walnut Street (now Muhammad Ali Boulevard), a thriving African-American business district. Children's room at the Western Branch of the Louisville Free Public Library, 1928.

Yet the seeds of decline were already being sown. To stem the tide of home foreclosures caused by the Great Depression, the federal Home Owners Loan Corporation was created to make affordable loans to keep people in their homes. To protect themselves from the possibility of defaults, participating lending institutions created maps that color-coded neighborhoods based on desirability and wealth. Those neighbor-



hoods marked as desirous were shaded green and blue, while those deemed hazardous or high risk were shaded in red—that is, "redlined" making it impossible for residents in those areas to secure those government-backed loans. Not surprisingly—and in fact, intentionally—the decisions driving which neighborhoods were better or worse were based on racial and ethnic demographics. The result was that communities like Russell were put at a distinct disadvantage, because residents there were denied loans to keep or purchase their own homes.

Then came the urban "renewal" that swept the country in the 1960s and 1970s, which had a devastating effect on many African-American neighborhoods, including Russell. According to a study by the University of Richmond, more than one million people were displaced as part of urban renewal efforts across America, most of them in predominantly Black urban areas. The toxic mix of institutionalized racism and discriminatory housing and banking policies marginalized and disenfranchised those with the least amount of power, leading to communities where businesses closed, social services became patchwork at best, and hope for the future became tempered by

the stark realities of paying rent and putting food on the table.

That was the case in Russell, where Walnut Street's commercial district was destroyed to make way for a massive public housing project called Beecher Terrace. The financial stability of Russell's residents began to erode, leading to sharp declines in income and opportunities. Today, the poverty rate among households is 3.5 times higher than the general Louisville population, and 60 percent of households depend on social services.

In addition to the malignant policies and practices that isolated Russell, there are literal dividing lines as well—most notably, the high-traffic Ninth Street corridor that divides downtown from West Louisville, where Russell

In 2018, the poverty rate among Russell households was 350% higher than the general Louisville population, and 60% of them depended on social services.



Beecher Terrace will become a mixed-income housing community.



Mayor Greg Fischer and youth leaders at the ribbon cutting for the third SmArt bus stop at 13th and Jefferson in Russell.

is located. University of Louisville researchers found the life expectancy on the West side of Ninth Street is 67 years, compared to 82 years for those living to the east—a fifteen-year drop in life expectancy in just a few blocks.

Poverty settles over communities and seeps into every element of life for those it touches. Without healthy, nutritious food, children show up at school unable to concentrate and fall behind academically. Without access to safe outdoor spaces, families are unlikely to exercise or engage in physical activities that enhance health. Without adequately funded educational and vocational opportunities, dreams of job security and upward mobility are

Life expectancy in West Louisville, where Russell is located, is 67 years, compared to 82 years for those living just a few blocks to the east-a fifteen-year difference in life expectancy.

dashed and crime increases. And as the prisonindustrial complex—a mutually beneficial alliance between the federal government and private businesses—grows more profitable and powerful, the U.S. penal system systematically and disproportionally punishes those from poor neighborhoods. (Author Michelle Alexander's The New Jim Crow: Mass Incarceration in the Age of Colorblindness describes in stark detail how prison has become a modern form of slavery, where government agencies and private companies make money off of more and bigger prisons, owing to the services they require and the cheap labor they provide—including having prisoners manufacture military uniforms.)

Yet the story of Russell is far from over. Despite fits and starts made in the past to restore the community to its former vibrancy, including well-meaning but misguided efforts that went nowhere, longstanding stakeholders and newer partners are investing in Russell's revitalization. Local residents, nonprofit and civic organizations, churches and faith communities, and private funders are endeavoring to ensure that the growth and development of the historic neighborhood is coordinated, transparent, and most important of all—beneficial to those who call Russell home. To be successful, these efforts and the funding that supports them must be integrated and sustained over time.

The Kenan Trust believes that communities like Russell are their own greatest assets. Rather than funding specific programs for a few years, the Trust takes a more holistic approach, beginning with listening to the people who live and work in those communities share where they have been and where they want to go, and then joining them as partners in that vision. In Russell and other communities, where the forces perpetuating poverty still hold sway, it's about acknowledging and remedying the past while creating a new ecosystem of social mobility, wealth creation, and self-sufficiency so that individuals can become the heroes and heroines leading the change in their own communities.

In and around Russell, commercial redevelopment investments are underway, many of them in partnership with Louisville Metro Government. The Louisville Urban League aims to transform a neglected 24-acre tract on Russell's western edge into a \$35 million track



and athletic facility dubbed the "Track at Ali" for its location at 30th Street and Muhammad Ali Boulevard. Organizers envision a world-class facility that will host national and international track and field events, attracting tens of thousands of people to western Louisville. A brand new branch of the YMCA of Greater Louisville replaces a former tobacco warehouse that lay vacant for more than a decade.



Community leaders discuss the construction progress of West Louisville's new Republic Bank Foundation YMCA.

Nonprofit health insurance provider Passport Health Plan is building its new \$130 million headquarters there, with the goal of providing services for every stage of life, from prenatal health to geriatric medicine. Additional nonprofits and community groups involved in revitalization efforts include the Concerned Pastors of Russell, Habitat for Humanity, Louisville Central Community Center, Inc., and Community Ventures, among many others.

In 2018, the William R. Kenan, Jr. Charitable Trust committed \$5 million in seed money to create **Russell: A Place of Promise (RPOP)**. A partnership between Louisville Metro Government and Cities United, RPOP will connect residents and businesses in the neighborhood with opportunities to build long-term individual, family and community wealth. The initiative aims to create pathways to affordable housing, new careers, business opportunities, new community gathering spots, and opportunities for whole-community health. The effort is fiscally sponsored by the Community Foundation of Louisville, Inc., whose core values include encouraging inclusive environments, respecting the worth and dignity of individuals, inviting honest discourse on equity and inclusion, and promoting the dismantling of structural and cultural barriers to individual achievement. CFL's fiscal sponsorship of RPOP positions the effort to receive additional grants and tax-deductible donations with the goal of transitioning RPOP into a stand-alone, community based organization.

The initiative builds on Kenan's \$5 million partnership with Cities United, a national effort to eliminate violence in American cities related to African-American men and boys, and Campaign for Black Male Achievement to prepare young black men in Louisville and Lexington for civic leadership roles within city government, and provide opportunities for education, jobs, and careers combined with leadership development and mentoring support.

Russell: A Place of Promise includes the following goals:

- Increased rate of homeownership by 20%
- Creation of at least five new businesses using a cooperative or nontraditional structure, with at least 30 new jobs created
- Development of a historic warehouse property to support at least 5 new businesses, 25 residential units and a variety of community uses
- Creation of a formal and informal operating and decision-making structure where residents can provide feedback and guidance leading to a documented community benefits commitment for RPOP in partnership with residents
- Creation of six new franchise ownership opportunities for Russell residents with 120 new jobs, and 150 career track jobs filled, and at least 50 young adults (ages 18-24) participating in workforce development programs

Core community partners include Cities United, the Metro United Way, the Louisville Urban League, Louisville Metro Government, One West, Kentuckiana Works, Park Community Credit Union, Louisville Center Community Center and Concerned Pastors of Russell. Local funders, including the James Graham Brown Foundation, the Humana Foundation, the Norton Foundation, DendraFund, the Gheens Foundation and the CE&S Foundation, have been engaged in this project, and a number of these foundations participated in a three-day site visit during which approximately 45 national funders, investors and thought leaders came to Louisville to learn about the project. Additional partnerships with a number of these national attendees are being developed.



Daryle Unseld of Metro United Way at a Russell: Promise of Place convening.

RPOP will be co-led by Cities United executive director Anthony Smith and Theresa Zawacki, who leaves her position as Senior Policy Advisor to Louisville Forward to serve as an Executive on Loan to the Place of Promise. "Russell has a legacy of self-determination," says Zawacki. "There are so many examples of people in the community coming together to do for themselves what society would not do for them, or because other options didn't exist. As we embark on this work, we want to make sure we're doing it right. Community engagement and buy-in is essential. In the past there have been well-meaning efforts that didn't work because the community wasn't involved intentionally from the start. We're walking the streets and meeting people where they are at the barbershop, in the park, on their front porch—to listen and ask questions and find solutions around what's possible."

Addressing the root causes of poverty requires sustained effort and systemic change. At a time

when our country feels more divided than ever, RPOP and the other efforts in Russell has the potential to serve as a model for successfully bringing many different stakeholders to the table to forge consensus. Cities United executive director Anthony Smith says the ambitious and potentially transformative efforts that RPOP hopes to accelerate begin with inviting all stakeholders to play a part.

"There is room for everyone, and that means that no one person has to take on the whole thing," he says. "Whether we're talking to businesses and funders or community leaders, we're encouraging people to think holistically about contributing not just their time, talent, and dollars, but also to creating spaces where people see how they can play a role. We're spending time in the community doing direct outreach, talking about what's coming and exploring how individuals can take advantage of those wealth-building opportunities and help the community grow."

Pride of Place



Community activist Jackie Floyd and her grandson.

Jackie Floyd has lived in the Russell community since 1990 and is proud to call Russell home. A caring and passionate advocate for her neighborhood, Floyd takes issue with folks who only see the negative aspects of Russell and not its resiliency and strength. "When I hear people say Russell is poor, I ask, poor in what? Because what I see are people who are survivors, who have been subjected to racism and low wages and discriminatory practices but who take care of their families and look out for each other. We have our ups and downs just like any community, but the bottom line is that we are a proud community." That cohesiveness and commitment to Russell was in full force in the summer of 2018 when the Family Dollar store chain announced plans to sell liquor in two of its Russell stores — adding to the already high concentration of alcohol vendors in the area. Along with the city's Metro Council, Floyd and her network of concerned citizens protested and lobbied the Kentucky Department of Alcoholic Beverage Control to deny the permits, citing studies that connect high concentrations of liquor stores with higher levels of substance abuse, violence, and poor health outcomes. The protests worked and the city denied the licenses.

A mother of five, grandmother of 12, and great-grandmother of four, Floyd is living proof of the strong multigenerational connections that persist in Russell. Yet even in her own family, she has seen how lack of resources can impel younger people to move away. According to a U.S. Census Bureau Tract analysis, Russell's population decreased by a third between 1970 and 2010. "I understand wanting the convenience of being able to walk to stores or the movies or good restaurants," she says. Her vision of Russell's future—a safe, healthy, thriving community—includes the possibility that members of her extended family who moved out of Russell will move back.

Still, Floyd knows that this vision comes with risks. If Russell's changing fortunes lead

According to a U.S. Census Bureau Tract analysis, Russell's population decreased by a third between 1970 and 2010. Jackie Floyd's vision of Russell's future—a safe, healthy, thriving



community—includes the possibility that members of her extended family who moved out of Russell will move back.

to gentrification and higher property taxes, current residents may find they can no longer afford to live there. "We're realistic," she says. "We know that if we want to attract restaurants, coffee shops, bookstores, nail salons-all the services our community would like to have—we need to show businesses that it makes good sense for them to be here. The question becomes, how do we bring new people in and keep old residents here? If your house is falling down and someone comes along and offers you money for it, that's hard to turn down. Or if you die without a will, and your property is left vacant and abandoned, the city or state can take that over. Part of what we're doing is educating people about how to maintain and improve their homes."

Faith and Vigilance

Like his father before him, Rev. David Snardon leads the congregation of Louisville's Joshua Tabernacle Missionary Baptist Church. He's also president of Concerned Pastors of Russell, a coalition of faith leaders from western Louisville churches who advocate for economic empowerment in their communities, and serves on the RPOP advisory committee.

Like Jackie Floyd, Snardon is guardedly hopeful about the many different agencies and individuals that are paying attention to Russell. Past disappointments and broken promises have strengthened his resolve to be a voice and a force for good on behalf of his community.

"When I look at how much money is coming into the city of Louisville, the question I have is how that money is being spent, where it's being spent and who is benefitting from it," he says. "It's not good enough to celebrate that we're bringing in \$13 billion into Louisville and we still have a failing school system, a homeless situation, and hospitals possibly shutting down. The past has shown me that when money comes in, poor black people are the last ones to benefit.



Rev. David Snardon speaks on the Russell community's potential.

"The reason why I engage in public ministry is because I see it as my calling, not just to my church but to the community that it is in. In seminary we talked about, what does a saved community look like? If our communities are going to hell in a handbasket, what good is salvation? When we pray, 'Thy will be done, on Earth as it is in Heaven,' what does that look like? How many liquor stores are there in heaven? Is heaven a gated community or an open space where everyone is welcome? For me that's what this battle is about, creating the image of God here on earth."

Affording Home Ownership

Home ownership has myriad social, economic, and health benefits, not only to that individual or family, but to the community in which it's located. Children of homeowners do better in school and are less likely to engage in risky behaviors such as drug use and criminal activity. Homeowners tend to be more involved in volunteer and civic activities than renters, the better to retain and improve their homes' value and ensure that their place of residence is safe and secure.

Owing to the continued impact of redlining and the high poverty rate in Russell, home ownership has been out of reach for many residents. Thanks to a \$7.5 million



Mayor Fischer celebrates with a family at their new Habitat for Humanity house.

commitment from the Park Community Credit Union (PCCU), folks who might not otherwise be approved can qualify for low-interest loans and closing costs to buy or renovate houses in Russell. PCCU has provided services to western Louisville neighborhoods for more than half a century—it was originally established to serve the employees of General Electric's Appliance Park—and currently holds nearly 900 loans totaling \$8.4 million in Russell, ranging from mortgages and credit cards to car and business loans.

Park CEO Jim Spradlin notes that credit unions were originally created to provide financial services to the poor and underserved, a mission that endures today. "I hear people say that what we're doing is risky, but providing services to those considered too risky by for-profit banking institutions is what credit unions were designed to do. So this kind of initiative is in our DNA. And because of our history here, and the relationships we have built, we consider it risky not to do this." Residents with credit scores as low as 585 can qualify for these loans, and the standard Private Mortgage Insurance is waived. PCCU is also providing information about wealth transfer and legacy planning to ensure that homes stay in families for future generations.

Job Development and Business Ownership

The Madison Street Warehouses occupy six-acres of former industrial property on Muhammad Ali Boulevard. With connections to higher wages jobs as one of RPOP's key goals, Smith and Zawacki are paying close attention to plans to transform the warehouses into a mixed-use space that could include small business incubators, hotels and restaurants, and multifamily residences. RPOP is exploring a partnership with KentuckianaWorks, a workforce investment board, and Louisville Urban League, to equip job seekers with job-specific training and connect them to career-track jobs, as well as providing stipends, and child care and transportation subsidies.

As the community explores how to create and cultivate new businesses, an emphasis will be placed on those that are cooperative and nontraditional, such as public-benefit corporations. Smith and Zawacki mention Greyston Bakery in Yonkers as an example of what they'd like to see in Russell. Greyston is a hugely successful company-it provides brownies for Ben & Jerry's, Delta Airlines, and Whole Foods and was a pioneer in the practice of "open hiring," which eschews interviews, resumes, and background checks. The approach eliminates screening out potential employees with limited educational accomplishments, criminal records, and spotty employment histories to investing in the success of those who are motivated and eager to work. Greyston invests in community service programs to support employees and their families. It's a model that aligns with RPOP's commitment to addressing and ameliorating the systemic nature of poverty and prejudice.

Connecting Russell residents to higher paying jobs and facilitating business ownership are key goals of RPOP, yet Anthony Smith and Theresa Zawacki note the need for pragmatic, grassroots conversations about what needs to happen first. "Right now, many in the Russell neighborhood are unemployed or underemployed, so we need to start by creating pathways for people to become employed so that they have the income and financial stability to take on a mortgage or launch a business," says Zawacki.



Madison Street Warehouses will become a mixed-use space.

For example, there are early conversations with Yellow Cab to train Russell residents to become cab drivers, earning an average of \$45,000, a huge increase over the community's average household income of \$14,700. And because many employed Russell residents work outside the West end, the Yellow Cab partnership might include the opportunity to provide reduced cost transportation to work for those residents, who currently rely on infrequent and inconvenient public transportation to access jobs in the far suburbs of Louisville.

Another possibility, says Smith, is nurturing a collaboration between Jefferson Community and Technical College with the Building Industry Association of Louisville to train Russell residents, and have them serve apprenticeship roles in the construction industry. With the average age of housing contractors in Louisville in their late 50s and early 60s, such a collaboration could provide career-path job training, address the looming need for trained workers and tradespeople, and provide opportunities for Russell residents to take over an established business or start their own.

"Our goal for RPOP is to serve as a catalyst and connector," says Smith. "We are responsible for understanding what is already happening in Russell, seeing where the gaps are, and connecting and accelerating efforts for its residents to thrive and prosper."

Starting With Now

RPOP's Theresa Zawacki hesitates when asked to imagine what Russell might look like in ten years. It's too soon for that. "I can't emphasize enough that building trust among Russell residents is our first priority; everything else follows from that. At the same time, regardless of where you sit in the community, people are looking for things they can point to and get involved with that are positive, and that make things better for everyone. RPOP is about Russell but it's also about building our collective future. It's bigger than one neighborhood or one person."

"

Whether we're talking to businesses and funders or community leaders, we're encouraging people to think holistically about contributing not just their time, talent, and dollars, but also to creating spaces where people see how they can play a role. We're spending time in the community doing direct outreach, talking about what's coming and exploring how individuals can take advantage of those wealth building opportunities and to help the community grow."

-Anthony Smith, executive director, Cities United



URTESY BN





A map of lending institutions' redlining practice in Louisville.

RUSSELL: A Place of Promise

Focused on improvement without displacement in African-American Communities

Louisville Metro Government through the Community Foundation of Louisville Cities United William R. Kenan, Jr. Charitable Trust