



TELLING OUR
Story
2016-2017
ANNUAL REPORT



Mission

Children's Scholarship Fund-Charlotte is a nonprofit organization dedicated to providing educational options for children (grades K-8) from low-income families residing in Mecklenburg County.

Purpose

The organization's purpose is to fund partial tuition assistance to economically disadvantaged children so that they may attend participating partner independent schools which most effectively address their academic, emotional, physical and/or spiritual needs.

Vision

Through our support, we believe that children can be taught where and how they best learn which will enable them to reach their highest potential.

THE *Story* OF A CHILD

I used to be the Director of Admission and Financial Aid at one of CSF-C's participating partner schools – that's where I first saw the impact of CSF-C dollars which changes the trajectory of economically disadvantaged children's lives.



I want to tell you a true story about a girl whom I will call "Charlotte". I met Charlotte and her mom when they were looking for a school. Charlotte was a timid second grader who kept her head down, not making eye contact easily, and said that she didn't like school very much. Her mom said that Charlotte was so quiet and obedient in the classroom that she wasn't getting noticed, receiving direction or being encouraged by her teachers. Charlotte's mom knew that her daughter needed a smaller environment where she could feel comfortable, be heard and have the opportunity to thrive.

I scheduled Charlotte's day-long visit to my school. On that day, I escorted the shy little girl to the classroom to begin what would be a life-changing experience for her. At the end of the day, a "different" child came back to my office – she was excited, enthusiastic and engaged, and couldn't stop talking to me about the friends she had made and the teachers she had worked with during that time. When her mom arrived to pick her up, Charlotte begged to come back to our school the next day.

We accepted Charlotte for the next school year; however her mom couldn't conceive how she would be able to afford the tuition – she already worked two jobs and was living pay check to pay check. With CSF-C's funding and the school's financial aid, Charlotte's mom decided that she was able to manage the tuition and accepted enrollment into my school. They both brought the contract to my office and Charlotte gave me the tightest hug I've ever received!

Charlotte graduated from our eighth grade and is now very successful in her CMS high school. Through CSF-C's funding, Charlotte was allowed to attend the school where she could be taught how she best learned and enabled her to reach her highest potential. This is my wish for all the economically disadvantaged girls and boys in Mecklenburg County who are assigned to a school where they're getting "lost" and are at risk of dropping out in high school.

I want you to know that 100% of your dollars to CSF-C are dedicated to scholarships, giving hope and opportunity to 356 children last year. Is there any better return on investment that will impact our community more? As our children are our future, please join us in providing educational options to economically disadvantaged children so that they are given a chance to succeed and become productive citizens in society.

Linda Ibsen
Linda Ibsen,
Board Chair

OUR *Inspiration*

You never know when a conversation will turn into a "miracle." My pastor stopped me in the church parking lot one Sunday and handed me a pamphlet about the scholarship opportunities available through Children's Scholarship Fund-Charlotte (CSF-C). I immediately filled out an application in time to be included in their lottery. Unfortunately, our family was on the waiting list for over three years. Needless to say, it was a thrilling day when I received the letter welcoming us into CSF-C's family!

Now I can look back at the benefits for five of our seven children. Each were given unique learning experiences with more individual attention to identify and address any issues and to recognize and embrace their strengths. Also, the "extended" classroom into the community allowed our children to explore the world around them, and to learn about and experience service to others. I am amazed by the doors that CSF-C opened for Charis, Kenan, Joy, Matthias and Silas! All of them were able to excel in the independent schools they attended, and were prepared to graduate from high school and continue their education in college.

Our children understand "to whom much is given---much is required." They have applied themselves academically, athletically and socially. CSF-C provided a platform for them to assume their places in management in the wine industry, master sales, real-estate, professional dance and the NFL. It is a joy for my husband, Mark and me to witness the "fruit" from our labor as parents and now mentors for our children.

As Charlotte has been ranked lowest in the country in upward mobility, I believe CSF-C is making an earnest attempt to turn this statistic around by providing opportunity and hope to economically disadvantaged children and giving them a chance to succeed. Please help CSF-C in their efforts – they are truly changing the trajectory of children's lives toward brighter futures.

Blessings,
Mrs. Falinda Y. Farley



Back row (l to r): Jose Nunez (Charis' husband), Matthias, Nathan, Timon, Kenan, Silas and Cassia (Silas' wife)
Front row (l to r): Natalie (Charis & Jose's daughter) Charis, Lilliana, Mark, Falinda, Joy

OUR *Criteria*

- ★ Families must reside in Charlotte and/or Mecklenburg County
- ★ Families must meet the standards of the Federal Free and Reduced Meal Program
- ★ Children must be attending grades K-8 during the year of funding
- ★ Children must be entering Kindergarten or transferring from a public school
- ★ Families are required to contribute at least \$500 every year toward their child(ren)'s educations; we're giving them a hand up, not a hand out
- ★ Scholarships are determined on a sliding scale based on the family's size and income, and the school's tuition
- ★ Each family/child must re-qualify every year to continue funding

OUR *Truths*

100%

of donations are **dedicated to scholarships**; remaining costs are absorbed by the unrestricted funding of a generous donor.

CSF-Charlotte is the **ONLY privately funded scholarship program** (grades K-8) in Charlotte-Mecklenburg County AND the **LARGEST privately funded scholarship program** in North Carolina.



CSF-Charlotte has invested in excess of

\$9.5 MILLION in over 7,500 SCHOLARSHIPS

since 1999

\$2,500

is the maximum scholarship



Children's Scholarship Fund

CSF-Charlotte is an **affiliate partner program** of CSF-National




A Subsidiary Foundation of
Foundation For The Carolinas

OUR *Program* *Summary*

TOTAL SCHOLARSHIP INVESTMENT

\$537,540



356

Children Enrolled

\$1,649

Average Scholarship
Awarded/Child

\$6,782

Average Tuition/Child

\$34,264

Average Family Income

\$1,963

Average Family
Contribution/Child

49

Participating Partner Schools

OUR *Students*

When evaluating CSF-C's alumni who were identified as returning to the Charlotte Mecklenburg School System after 8th grade, and had the potential to graduate between the 2006-2007 and 2013-2014 school years:

94.5% of CSF-C's alumni graduated, as compared to their demographic peers at 71.1%-86.5% over that seven year period.

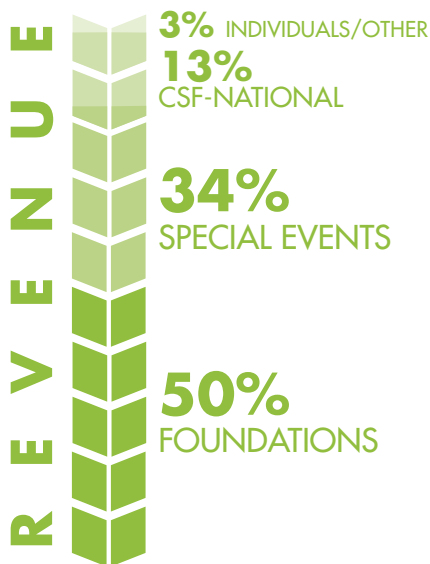


CSF-C's alumni achieved better academically, had greater attendance, were suspended less and graduated at a higher rate, relative to other economically disadvantaged students.*

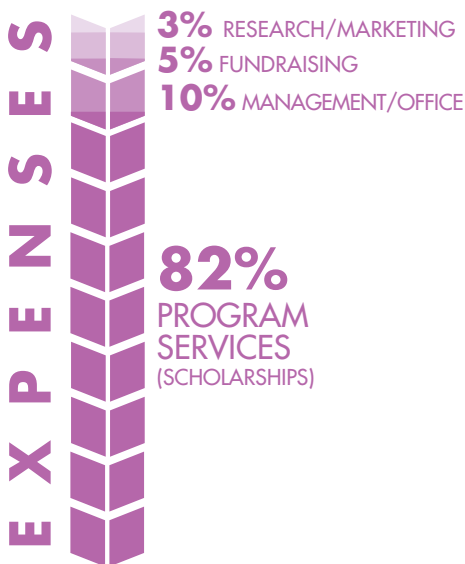
*UNC-C's Urban Institute for Social Capital

OUR *Financials*

TOTAL REVENUE
\$814,006



TOTAL EXPENSES
\$811,358



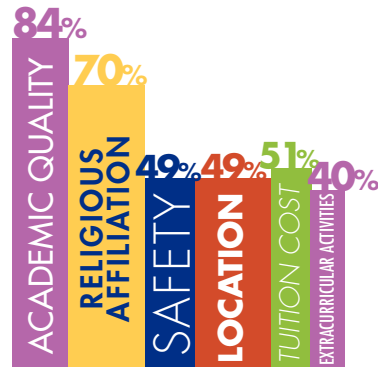
* 100% of donations are **dedicated to scholarships**; remaining costs are absorbed by the unrestricted funding of a generous donor.

OUR *Parent Survey Results*

We asked our parents in what ways did your child(ren) improve significantly this past year?



We also asked what their top reasons were for selecting the schools they chose?





OUR *Leadership*

BOARD OF DIRECTORS 2016-2017

Andrew Lindner – *Board Chair*

Faye Morrow Bell
Hillary Crittendon
Phyllis Gill
Anna Glass
Dorothy Killeen
Linda Ibsen

Merrill Mills
Lawrence Moore
Pearson Pendergrass
Stormy Scott
Matthew Tilley
Charles Watson

DIRECTORS EMERITI

Charles S. Anderson
Weston Andress
Pat Augustine
Baker Burleson
Scott C. Bortz
Robert W. Bradshaw*
Stephen E. Cummings
Meredith Dolhare
Suzie Yun Dunbeck
Nancy R. Ehringhaus
Catherine Fortin
Fletcher Gregory
Ned H. Hardison
Peter L. Keane
Karen Knoble
John F. Mangan, Jr.
Robert E Mason III
Father Louis Oats

Laura Park
Bailey W. Patrick
Claudia Plepler
Sean Preston
Cecilia A. Ramirez
Marjorie Moses Schwab
Charlene Slaughter
Cecil Stodghill
Jonathan Vogel
Van Weatherspoon
Jackie Wells
John Spencer Whitman
Danielle Felix Williams
Earnest Winston
Brian Wise

**Deceased*

STAFF

Ann Barnes Robertson,
Executive Director

Lisa Clarke Watford,
Program Administrator

OUR *Impact*

After almost 20 years of positively impacting the lives of economically disadvantaged children, CSF-C is celebrating our past, assessing our current mission and preparing for our future.

Since 1999, Children's Scholarship Fund-Charlotte (CSF-C) has invested close to \$10 million in educational options for an estimated 7,500 scholarships for underserved, at-risk children (grades K-8) in Mecklenburg County. A Student Outcomes Report, conducted by UNC-C's Urban Institute for Social Capital, confirmed that our alumni who enrolled in or returned to the public schools in 9th grade achieved better academically, had more consistent attendance, were suspended less and graduated at a higher rate than their demographic peers.



Today, we continue to offer opportunity to children as evidenced by CSF-C's Board Chair's poignant and inspirational story about "Charlotte" (page #1) and the update provided by the mother of five former scholarship recipients about her children and their impressive accomplishments (page #2). The parents of these children were empowered with educational options for their children, and their children were given the chance to succeed in an environment where they could reach their highest potential.

Our future is focused on narrowing the achievement gap in Charlotte and Mecklenburg County. CSF-C is committed to assisting our community in efforts to alleviate poverty through the intrinsic power of education which will directly affect our children's ability to realize upward mobility, regardless of income, race or zip code.

Thank you so very much for your support over the past or your consideration of a gift in the future - your investment is 100% dedicated toward scholarships. Through your partnership, we can help underwrite our scholarship recipients' stories by giving them the opportunity and hope that will change the trajectory of their lives. CSF-C is providing the foundation to each child's story – ensuring that their "once upon a time" ends "happily ever after"!

A handwritten signature in black ink, appearing to read "Ann".

Ann Barnes Robertson,
Executive Director

OUR Donors

2016-2017 (JULY 1, 2016 - JUNE 30, 2017)

ROBERTSON FELLOWS (\$10,000+)

Alpha & Omega Foundation
Bloomberg
Charlotte Heptathlon
Children's Scholarship Fund
(National)
Goldman, Sachs & Co.
Robertson Foundation
The Leon Levine Foundation -
Sandra and Leon Levine
The Merancas Foundation

PATRONS (\$4,000 - \$5,999)

Banbury Partners
Bank of America Merrill Lynch
Dickson Foundation
Mr. Walter Dolhare
Mr. Brian Gootzeit
Merrill Lynch Bank of America
Morgan Stanley
Tourmaline Partners
UBS - The Andover Group
Wells Fargo Capital Finance -
Good Works

MENTORS (\$2,000 - \$3,999)

Ms. Karen Knoble and
Mr. Barry Bobrow
Mr. and Mrs. Alfred Dawson
Eze Castle Integration, Inc.
Guidepoint Global
Mr. Matthew Jelnicki, CPA
KPB Corporation
Mr. and Mrs. John Mangan
Mr. and Mrs. Martin Robinson
Solovis
UBS - The Andover Group
Mr. and Mrs. William Williamson III
Mr. and Mrs. Joe Young

VALEDICTORIANS (\$1,000 - \$1,999)

Alpha Theory
Anonymous
Anonymous (Wells Fargo Support
Campaign)
Atlas Principals
Bissell Family Foundation
Mr. and Mrs. Tim Casey
Mr. and Mrs. Bruce Downing
Mr. Christopher Flouhouse
Mr. and Mrs. James Hynes
Ms. Dorothy Killeen
Mr. Brian Lesesne
Mr. and Mrs. Andrew Lindner
Mr. and Mrs. Robert E. Mason III
Mr. and Mrs. Robert Miller
Mr. and Mrs. Lawrence Moore

Mr. and Mrs. Walker Poole
Robert W. Baird & Co.
Mrs. Majorie M. Schwab
Seward & Kissell
Mrs. Kathleen Small
Mr. and Mrs. Wellford Tabor
Trinity Episcopal School
Mr. and Mrs. Charles Watson
Ms. Danielle Williams

SALUTATORIANS (\$500 - \$999)

Mr. and Mrs. Scott Bortz
Charlotte Latin School
Mrs. Thomas Hal Clarke
Mr. Rufus Dalton
Mrs. Mary Anne Dickson
Mrs. Nancy Ehringhaus
Mr. and Mrs. Eric Eubank
Mr. and Mrs. R. Scott Glass
Mr. and Mrs. Kelly Graves
Mr. and Mrs. William Hardison
Mr. and Mrs. Ben Hill
Mr. and Mrs. Paul Ibsen
Mrs. Callie Kelly
Mr. and Mrs. William E. Mills
Mr. and Mrs. Pearson Pendergrass
Providence Day School
Mr. William Lee Robertson, Jr.
Mr. and Mrs. Dan Thomas
Mr. Andrew Tucker
Mr. and Mrs. Trey Winslett

SCHOLARS (\$250 - \$499)

Adventist Christian Academy
Ms. Ann Simmons Barnes
Mrs. Katherine Belk
Mr. and Mrs. George Bell
Mr. and Mrs. Michael Bradshaw
Mrs. Robert Bradshaw
Mr. and Mrs. Todd Buelow
Ms. Cameron Capel
Charlotte Christian School
Charlotte Preparatory School
Charlotte United Christian Academy
Mr. and Mrs. William B. Crittendon
Mr. and Mrs. Perrin Q. Dargan III
DMA International
Mr. and Mrs. Roddey Dowd, Sr.
Mr. and Mrs. Robert Dunn
Mr. Justin Ferguson
Mr. Blair Fisher
Mr. Leighton Fogan
Mr. and Mrs. Thomas Fortin
Ms. Kathryn Hannon
Ms. Rachel E. Hannon
Mr. and Mrs. Landrum Henderson
Mr. and Mrs. Thomas Hunter IV
Mr. Joel R. Lanik
Mr. and Mrs. John Laughlin

Ms. Susan McBarnet
Dr. and Mrs. William Merlo
Mr. and Mrs. Daniel Miller
Mr. and Mrs. Charlie Morris
Mr. Ian Morris
Palisades Episcopal School
Mr. and Mrs. Stephen L. Philipson
Ms. Claudia Plepler
Mr. and Mrs. Ryan Popp
Mr. and Mrs. Rich Potts
Printaim
Ms. Elizabeth Ren
Mr. Alexander Robertson
Mr. and Mrs. Shannon Rydell
Mr. and Mrs. Kyle Sable
Mr. and Mrs. Paul R. Scarborough
Doctors Chris and Lili Teigland
Mr. and Mrs. Chris Teter
The John Crosland School
Varient Perception
Victory Christian Center School
Mr. Seth Wilfong
Mr. Erik Wilkins
Mr. and Mrs. Landon Wyatt
Dr. and Mrs. John Young

GRADUATES (\$100 - \$249)

Mr. and Mrs. William Blue, Jr.
Mr. Andrew C. Burns
Mr. and Mrs. Wesley Clark
Mr. David Demeter
Edgehill Capital
Mr. and Mrs. J. D. B. Ehringhaus
Mr. and Mrs. Mark Fiddes
Mr. and Mrs. James Ford
Mr. Stuart Friou
Mr. and Mrs. William H. Gill
Mr. and Mrs. Adam Glassner
Ms. Mimi Harris
Mr. John P. Harrison
Mr. and Mrs. Frank Henry
Mr. Richard S. Henry
Mr. Cameron Hight
Mr. and Mrs. Marshall Lindner
Mrs. Kim Lukacs
Mr. and Mrs. Steve Lynch
Ms. Angela Moss
Mr. Edwin Rasberry
Mr. and Mrs. Cecil Stodghill
Ms. Nichole Wagner
Mr. and Mrs. Debose Williamson
Dr. Shaheen Wirk

FRIENDS (UP TO \$100)

Mr. and Mrs. Stuart Armstrong
Mr. and Mrs. Andrew Atkins
Mr. Brian Bernhard
Mr. Michael Best
Mr. and Mrs. Kenneth Beuley

OUR *Future Events*

Rev. Mary and Mr. Charles Bowman
Mr. and Mrs. Scott Chappell
Mr. and Mrs. Robert Chiles
Ms. Morgan Coriale
Mr. Alexander Covington
Mr. Charles Creech
Ms. Sara Delaney
Mr. and Mrs. Thomas D. Douglas
Ms. Brittany P. Drozda
Mr. and Mrs. Ry Dunbeck
Mr. and Mrs. Mike Elliott
Mrs. Katherine Ellis
Mrs. Lindsay Field
Mr. Barry Finkelstein
Mr. Brian Fitzgerald
Mr. Matthew Freund
Mr. and Mrs. Timothy Gelorme
Mr. and Mrs. Jonathan Greene
Mr. and Mrs. Richard Handford
Dr. Stephanie Hannon
Mr. and Mrs. Charles Hodges
Ms. Janice Kane
Mr. and Mrs. Jack Kester
Mr. and Mrs. Jamie Kiser
Mr. Brad Kniejski
Mr. and Mrs. Dave Kuck
Mr. and Mrs. Hal Levinson
Ms. Meredith Lynch
Mr. and Mrs. Michael Mayberry
Dr. and Mrs. Angus McBryde
Mr. and Mrs. Jordan McCarley
Mr. and Mrs. Tom McCarty
Ms. Jessica McComb
Mr. and Mrs. Mike McHugh
Mr. and Mrs. Mark Mealy
Mr. Mark Millard
Mr. and Mrs. Everette Mills
Ms. Linda Nore
Mrs. Gale Osborne
Mr. and Mrs. William Palmer
Mr. and Mrs. Bailey W. Patrick
Mr. Robert N. Peffers
Mr. and Mrs. Rob Ponton
Dr. and Mrs. Al Rhyne III
Mr. and Mrs. Stormy Scott
Mr. and Mrs. Alec Sheaff
Ms. Jennifer Shoffner
Ms. Luv Sodha
Mr. and Mrs. Sterling Thomas
Mr. and Mrs. William Thompson, Jr.
Mr. Aubrey Threadgill
Mr. and Mrs. Cameron Todd
Mr. and Mrs. John Scott Trotter
Ms. Jessica Warzybok
Mr. and Mrs. Spence Whitman
Mr. C. E. Williams
Mrs. Allison Worthington
Mr. and Mrs. Jim Yuhas
The O Report



12th Annual *Fall Event*

Wednesday
November 15, 2017
6 – 9pm
Napa on Providence

*RSVP by
Friday, November 10th*



13TH ANNUAL SPRING EVENT

Thursday, April 26, 2018
6:30 – 9:00 PM
Myers Park Country Club



3rd Annual Charlotte Heptathlon

Saturday, May 19, 2018
8am – 12pm
Queens University Athletic Fields
charlotteheptathlon.com

**Proceeds benefit the
Children's Scholarship Fund-Charlotte*

Recruit your team & start training now!

Visit csfcharlotte.org/events-news
for more information



Children's Scholarship Fund

Nationwide at a Glance

SCHOLARSHIP RECIPIENTS

Number of students	25,704
New scholarships awarded	7,979

PROGRAM STATISTICS

Average scholarship amount*	\$1,807
Average tuition per child	\$5,271
Average family income	\$34,313
Total investment	\$46.4M

A LEGACY OF EDUCATIONAL OPPORTUNITY

Children helped since CSF's inception	166,000
Total invested in scholarships	\$741M

**The scholarship amount is based upon a family's size, income, and the tuition at the school the family chooses for their child.*

In 2017, Charity Navigator gave CSF a four-star rating – the highest rating the watchdog organization awards to charities for fiscal responsibility, accountability, and transparency.



220 North Tryon Street Charlotte, NC 28202
www.csfcharlotte.org



A Subsidiary Foundation of
Foundation For The Carolinas