

Center for Family Philanthropy

At the Community Foundation for Greater Atlanta we serve individuals, couples and families by helping them find the joy and passion in philanthropy.

We define family philanthropy as two or more people connected, with special ties, focusing on what matters most—using philanthropy to achieve a greater purpose.



At the Foundation, we realize that ties that bind may or may not be familial. To that end, we encourage multi-generational family philanthropy involving parents, grandparents, uncles, aunts, adult and young children and others in the family group. Our philanthropic advisors are trained to work with families who are physically close as well as with families that are geographically dispersed. With specific tools and techniques, we can help you identify what matters and guide you as you act on those specific values and interests. The Center for Family Philanthropy provides a deeper level of engagement than the essential services.

Philanthropy is an important action for future generations. Modeling this behavior to your lineage is a superb way to teach them the joy of giving. It opens up natural dialogue pathways for discussion about family legacy and succession.

PHILANTHROPY SERVICES

Annual or semi-annual meetings

Our team is trained to facilitate effective sessions that set the stage for working together. We work with you to develop a customized learning agenda and plan. Throughout the year we can refine, implement and evaluate the plan. These meetings can take place at your home, office or at the Community Foundation in Loblolly, our room specially designed for family meetings.

Mission and values statements

Having a mission or values statement is important to your philanthropic narrative. It is one of the many ties that bind, and can become a benchmark when determining where to place your philanthropic treasures. It can be changed over time, but is developed into an important document that shares what passions you stand for and why those values are so important. We use special custom learning tools to help you create your values and legacy statements.



Family tree and genogram development

It is important for everyone to know your family story. The Community Foundation's tools make it easy for you to share your story and identify issues that are important to your family.

Family timeline

Like the family tree and genogram, developing a timeline allows you to share important individual milestones and family events; as well as share those events that have helped to shape your family's philanthropic passions over the generations, or begin to tell a new story for a genesis gift.

Story-telling

So much of family philanthropy involves the sharing of stories. Storytelling helps transfer values and share unique elements of your inspired gift through the generations. We help share and document these stories. This might be a video recording, or even the development of a Legacy Statement.

Volunteer opportunities

Philanthropy is the giving of time, talent and treasure. Our team has in-depth knowledge of the metropolitan Atlanta region, down to details about individual communities and can help you identify organizations with meaningful volunteer opportunities.

Comprehensive grantmaking services

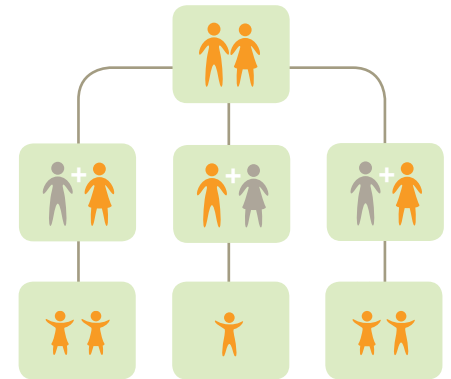
Grantmaking is the heart and soul of philanthropy. You may identify one or more issues to focus on over the course of a year or more. Our team will help you identify organizations whose purpose matches your philanthropic passions. We work with you to evaluate those organizations through proposals, meetings and ultimately, the return on investment you would like to see for your philanthropic gift. After your choices are made, we help you throughout the process; from preparing grant checks to implementing systems for you to see the impact of your grants. We will work with you to help you refine your process over time. The point is for you stay focused on the joy of giving, while we do all of the administrative functions.

Matching grants program

Originally developed in collaboration with one of our multi-generational families, the Community Foundation's expertise has evolved to include the facilitation of a matching grants program for children between the ages of five and 18. Children raise funds independently for an organization or project; and the family then matches the funds raised dollar for dollar. Children then make a meaningful grant to organizations they care for in their own communities.

Customized nonprofit reports

The Foundation maintains reports on hundreds of local nonprofit organizations to help you learn more about specific nonprofits in our region. We have many reports on specific areas of interest including: animals, children services, education, employment and job training, healthcare, homelessness, housing and women's services. As a service to you, we will prepare customized reports based on your specific needs, always focusing on connecting your passion with nonprofit purpose.



SERVICE OPTIONS

Service Options	Essentials	Personalized Philanthropic Services
PHILANTHROPIC PLANNING		
Philanthropic advisor assigned to fund	•	•
Annual philanthropic fund review meeting	•	•
Values and interests exploration	•	•
Facilitated philanthropy strategy sessions with wealth advisors		•
Development and implementation of strategic philanthropic plan		•
Facilitated family meetings		•
Family timeline, genograms and family trees		•
Development of mission and vision statements		•
Preparation and management of your philanthropic budget		•
EDUCATION		
Access to impact strategies focused on metro Atlanta region	•	•
Invitation to donor events and tours	•	•
Customized educational seminars	•	•
Connection to peers with similar interests, including donor collaborative funding groups	•	•
Access to philanthropy communications	•	•
Personalized nonprofit visits		•
Member-level participation in regional and national philanthropy conferences		•
Governance (nonprofit board roles and responsibilities)		•
GRANTMAKING AND EVALUATION		
Access to Community Foundation's nonprofit library of reports	•	•
Customized nonprofit organization assessments and evaluation reports	•	•
Extra Wish (catalog of giving opportunities)	•	•
Due diligence on all grants recommended	•	•
Complete grantmaking and evaluation services		•
Requests for proposals and solicitation		•
Grant docket development		•
Complete proposal review and vetting		•
Customized site visits		•
Grant distribution and awards		•
Grant evaluation		•
Customized funding recommendations		•
Customized issue reports		•
Customized organization reports		•
Access to expert staff with regional program and policy expertise		•
Customized grants processing		•

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“Part of our charge at the Community Foundation is engaging philanthropists – of all ages. We are interested in teaching young people about the power of philanthropy and the importance of giving back.”

– Alicia Philipp, president



Service Options (continued)	Essentials	Personalized Philanthropic Services
LEGACY AND SUCCESSION		
Succession planning	•	•
Deferred gift strategy consultation	•	•
Legacy statement preparation		•
ADMINISTRATION		
Deferred gift strategies	•	•
Preparation of legacy statements		•
ONLINE SERVICES		
Access to Donor Central – online platform with fund and foundation information	•	•
Manage intranet (e.g. Google sites for families)		•
FINANCE AND INVESTMENT		
Audited financial statements	•	•
<i>Access to one of four investment options:</i>		
(1) Community Foundation Investment Pool	•	•
(2) American Funds	•	•
(3) Conservative Option	•	•
(4) Individually Managed Option (\$5,000 minimum investment fee)		•
NEXT GENERATION		
Planet Philanthropy (program for 4-15 year-olds)	•	•
Customized training for next generation		•
Youth Philanthropy (programs at area schools; Junior Achievement Philanthropy Store)		•

About us

Since 1951, the Community Foundation has been connecting donors, nonprofits and community leaders to strengthen the 23-county Atlanta region through philanthropy. By uniting the passions of donors with the missions of nonprofits, the Community Foundation serves as a conduit for change by providing quality services and innovative leadership on community issues. Visit cfgreateratlanta.org for more information.

For additional information on how you can begin or continue a philanthropy program, please contact Audrey Jacobs, director, Center for Family Philanthropy at ajacobs@cfgreateratlanta.org or 404.588.3194.

“Our family set out to make a small difference in the world and ended up transforming ourselves. We basically traded “stuff” for a closer family unit. That’s living richer.”

– The Salwen family

