



Community Foundation for Greater Atlanta: What you don't know about us will surprise* you.

(*and delight)



Community
Foundation
for Greater Atlanta





What is the Community Foundation for Greater Atlanta?

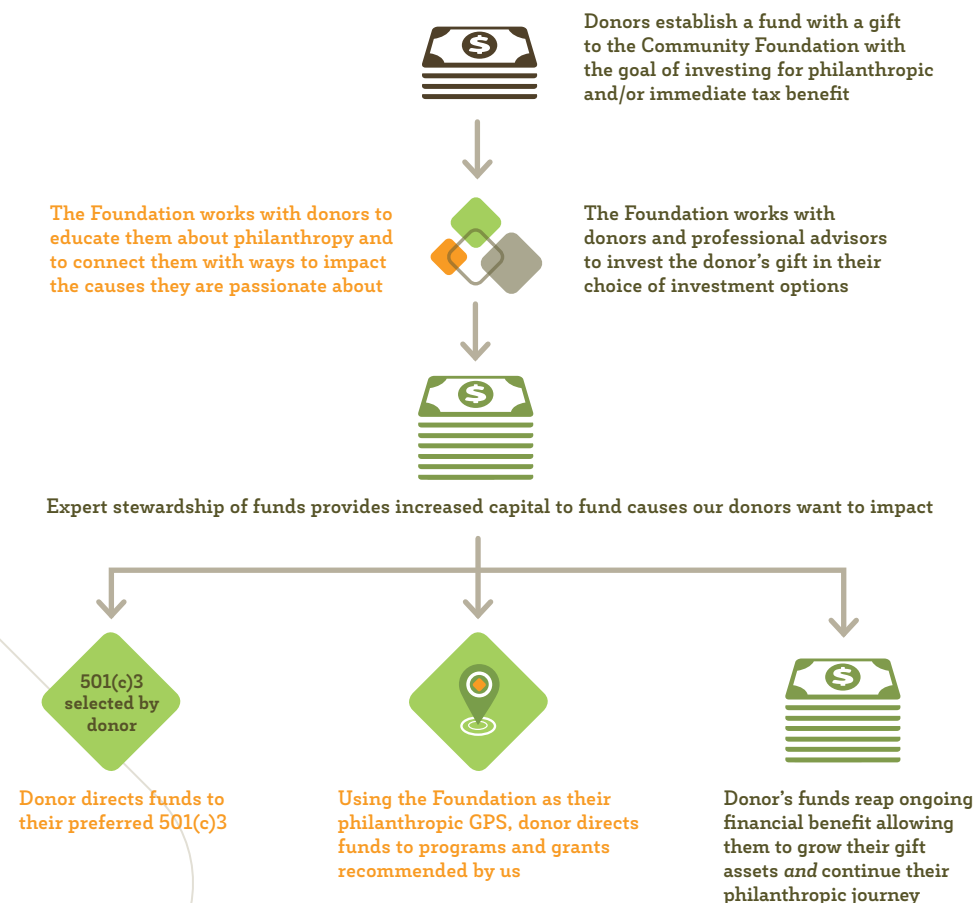
- ◆ We are a nonprofit that connects philanthropists with the nonprofits fulfilling their passions.
- ◆ We are the 2nd largest foundation in the state by asset size (the only one larger is the Woodruff Foundation).
- ◆ Of the 750+ community foundations nationwide, we're the 18th largest.
- ◆ We serve the 23-county metropolitan Atlanta region, but donors may give nationally and internationally.
- ◆ We were formed in 1951 by four Atlanta banks with a strong desire to serve the region.
- ◆ We are a trusted steward of investments, with more than \$955 million in assets.
- ◆ We're dedicated to improving our region by focusing on important issues in five key Impact Areas: Arts, Community Development, Education, Nonprofit Effectiveness and Well-being.



What does the Foundation do?

- ◆ We work as a GPS for our donors to help them navigate their philanthropic journeys, which for some donors includes the next-generation and their extended families.
- ◆ We work to educate our donors and constituents on the region's challenges and the opportunities they have to make positive change.
- ◆ We offer donors options from a donor-advised fund (where the donor makes recommendations) to an unrestricted fund (where we direct investment dollars based on where there is the most need/opportunity) and everything in between.
- ◆ We connect like-minded donors in an area of interest, and develop their thinking through innovative programs and behind-the-curtain perspectives on what's happening in that area. As donor knowledge grows, so does their commitment and impact.
- ◆ Our donors provide grants to nonprofits through our administrative services—7,300 grants to 2,400 nonprofits in 2016 alone.
- ◆ We work with donors to create a philanthropic legacy that lasts beyond their lifetime.

Here's a simplified view of how it works:



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 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		•
GRANTMAKING AND EVALUATION		
Access to Community Foundation's nonprofit library of reports	•	•
Extra Wish (catalog of giving opportunities)	•	•
Due diligence on all grants recommended	•	•
Access to expert staff with regional program and policy expertise	•	•
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		•

Service Options	Essentials	Personalized Philanthropic Services
LEGACY AND SUCCESSION		
Succession planning	•	•
Deferred gift strategy consultation	•	•
Legacy statement preparation		•
ONLINE SERVICES		
Access to Donor Central – online platform with fund and foundation information	•	•
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 children and teens)	•	•
Customized training for next generation		•
Youth Philanthropy (programs at area schools; Junior Achievement Philanthropy Store)		•

Services range from minimal annual administrative fees of \$1,000 (see column in chart above marked “Essentials”) to enhanced personalized services at a minimum annual fee of \$2,500.



Mission

The Community Foundation for Greater Atlanta strengthens our region by providing quality services to donors and innovative leadership on community issues.

Vision

To be ***the*** most trusted resource for growing philanthropy to improve communities throughout the Atlanta region.



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