



Where will your philanthropic journey take you?

Annual Report 2016

Where do you want to go?

○ Enter starting point
⋮
📍 Enter philanthropic destination

GET DIRECTIONS

The Community Foundation for Greater Atlanta functions as a philanthropic GPS.

So wherever you begin, wherever you want to go – we can help you get there.



Finding **JOY** is the heart of what we do – for philanthropists, for the nonprofits they support and for the community that benefits from it all.

Where will your philanthropic journey take you? Each of us has a different beginning and a different destination. How do you know how to have the most impact? How do you leave a legacy? That's where we come in.

No matter what your journey looks like, the Community Foundation is here to help you find your way. We pride ourselves on being a wayfinder, a philanthropic GPS. In these pages, you will experience stories about how we did that in 2016 for our donors and through our programs.

For us, 2016 was an adventure as the first year of our big, ambitious strategic plan. It was a year spent examining how we can be better, faster, more impactful. We are devoted to making sure that we will be Atlanta's community philanthropic anchor for years to come. We are renewed and recharged by our plan and by our relationship with each donor, nonprofit and partner that joins us on this journey.

So, tie on your favorite sneakers and take a walk through 2016 with us. We hope you enjoy the landscape.

 
John C. Reid, **Chair** Alicia Philipp, **President**



Let's get started!





Enjoy this peek at a few philanthropic journeys that the Community Foundation has helped navigate:

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The Choate Family: Hard work turns into giving back

Millard and Sue Choate say the Great Depression was the foremost influence on their lives, though neither lived through it personally. “We both learned the value of hard work, and of a dollar earned, from our parents,” Millard said. In business as in philanthropy, he is laser focused on return on investment (ROI). “A gift doesn’t have to be large to be transformative,” Millard said. “A scholarship can be the ultimate ROI allowing someone to earn a degree and gain opportunity.”

The family believes in giving a hand up, not a hand out. “Our success is a gift from God, it’s not ours to keep,” Sue said. “We believe in paying it forward to the benefit of others.” Their daughters, Emily and Katie, were raised knowing that hard work pays off and that it’s important to give back through volunteerism. Today they are fully engaged in philanthropic decision making. “I’m proud to share this journey with my family,” Millard said. “We can see the results from nonprofits whose missions are dear to us, and there’s no better ROI than that!”



The Choates were referred to the Community Foundation in 2002 and established a donor-advised fund. The Foundation provided them with help identifying nonprofits that support their passion for giving back and gave them the opportunity to quietly focus on philanthropy. In 2016 they established a supporting organization, the ROI Fund, Inc., which will give them even greater flexibility and enable their daughters to become more involved.





Lorde-Rustin Giving Circle: **Philanthropy born from friendship**

Members of the Lorde-Rustin Giving Circle are, first and foremost, friends. A casual conversation about how individuals were giving back evolved into a formal commitment to collective philanthropy. The group's giving targets childhood education and development and also supports lesbian, gay, bisexual, transgender and questioning (LGBTQ) youth in metro Atlanta. While comprising a racially diverse membership, the giving circle especially sought to fill a gap its members saw around the need for successful people of color to give back to other people of color. In 2016 they received a matching grant from the Funders for LGBTQ Issues' Out in the South Initiative to amplify their giving.

The giving circle has deliberately maintained a defined number of members so that everyone has a voice and so that the chemistry and camaraderie of the group remains intact. Their name was inspired by social activist and poet Audre Lorde and civil rights leader Baynard Rustin – who both devoted their lives to effecting social change. One member said, "I talk about what we're doing constantly with friends and family. It's one of the things I'm most proud of, and I've accomplished a lot in my life!" Another called it, "an amazing journey."



"We are all very busy people," one member said. "We didn't want to go through the process and paperwork to set up a nonprofit. We just wanted to give to nonprofits doing great work, which led us to the Community Foundation."



Rob and Suzanne Boas: Family meetings inspire giving passion

Rob and Suzanne Boas are long-term donors to the Community Foundation and until recently their decisions around giving were made by just the two of them. “We have always tried to encourage our children to provide financial support to causes and organizations they believe in, but once our grandchildren were born we got more serious about that effort,” Suzanne said. “That’s when we started thinking about how we might do a better job of sharing our philanthropic goals and getting our son and daughter involved in recommending donations from our donor-advised fund.”

With the encouragement and help of both their financial advisor and their philanthropic advisor at the Community Foundation, a family meeting was set to discuss philanthropy, legacy and priorities. While there are some differences in the organizations and causes that the various family members are focused on, they are all committed to the importance of giving. Suzanne has served on the Community Foundation’s Board of Directors and Investment Committee, including serving as Board Chair from 2014 to 2016.



“It can take a tremendous amount of work to run a family foundation, and we didn’t want to burden our children with carrying that administrative overhead. As our children’s families grow and their interests change we are confident they will get the support they need from the Community Foundation to effectively carry out their future philanthropic goals.”

– Suzanne Boas



John Siegel: Happy Chairs make happy hearts

John Siegel is a second-generation donor to the Community Foundation. His parents, as well as some siblings, had funds with the Foundation. After achieving success in business it was a natural next step for him and his husband, John Templeton, to open a donor-advised fund together for their philanthropic giving. Over the years John and John have provided gifts in three focus areas, supporting the gay rights movement, their church and causes that support children. Through the fund they were some of the earliest supporters during the emergence of the HIV/AIDS crisis in Atlanta.

John and John have 21 grandchildren and two great-grandchildren between them and in retirement, John S. began painting rocking chairs for each of them. Seeing the joy it brought them grew into a passion for supporting children in need through what he calls his “Happy Chairs”. He has painted 540 chairs and counting for Habit for Humanity (see photo below), children in the foster care system, for Head Start programs and classrooms, and for charitable auctions. Every year he reviews the Community Foundation’s Extra Wish giving catalog and donates a chair, or chairs, to featured organizations that support children.



“The Community Foundation helped us to see others who were giving which opened us up to our own giving. It’s a positive and respectful relationship. We can be generous about our giving and the Foundation is supportive of what we want to support.” – John Siegel

Impact Areas

As the first year of our bold and ambitious three-year strategic plan, in 2016 we focused on improving ourselves. It was a journey of discovery and a year of introspection, research, conversations and connection. We listened to you, our region and our donors. We asked ourselves – to what end? What impact do we really want to make on the Atlanta region? How do we leverage our strengths and relationships? In short, how do we know we are making a difference?

The answer is our new Impact Areas. Our organization invests across the Atlanta region through grantmaking, partnerships and public policy. Now, that work is driven by these Impact Areas, with focused, measurable objectives to help us make meaningful change. These five areas are a promise to the 23-county region that hand-in-hand with our donors, nonprofits and civic partners, we will make Atlanta a place where all residents can thrive and prosper.



Arts



Community Development



Education



Nonprofit Effectiveness



Well-being

On the following pages, you will see the Impact Areas in action. Experience how art can spark a conversation or how giving power to parents can change education. This is the impact we seek – one story, one nonprofit, one partnership or one person changed at a time.

Arts: True Colors gets people talking

Kenny Leon views every play at True Colors, his Atlanta theater company, as a question for the community. How does race influence the law? What can save failing schools? How can we combat the stigma of mental health? Before each show, True Colors' free Community Conversations program deepens the audience's experience with the arts. The discussions feature panels of experts, politicians, and civic, education and religious leaders. True Colors' production of David Mamet's "Race" launched the first Community Conversation in 2013. Now, True Colors hosts a conversation for every production. In 2016, True Colors received a general operating support grant for \$120,000 over two years from the Community Foundation. The grant helped True Colors—also a Nonprofit Toolbox grant recipient—cover expenses to expand the Community Conversations program. "Hundreds have attended, as True Colors provides a safe space for tough conversations about diversity and inclusion," says executive director Jennifer McEwen. Adds Leon, the Tony Award-winning director, "True Colors is a theater for everyone."



"The Community Foundation gives us general operating support. It gives us freedom and lets us breathe."

– Kenny Leon, founder and artistic director, True Colors Theatre Company



“Jeff and I see this as a chance to be a part of something truly innovative on a shared journey with fellow donors, and that’s really exciting for us!”

– Sivan Hines, M.D., Community Foundation board member, donor and *Spark Opportunity!* participant



Community Development: Sparking a journey of opportunity

Neighborhood revitalization is most successful when the neighborhood remains intact and change is driven by residents. This was a key learning of our *Spark Opportunity!* donor circle after they embarked on a journey to learn about the greatest needs in our region and to meet some of the individuals and nonprofits addressing these challenges. The *Spark Opportunity!* circle formed in 2015 with a dedicated group of donors focused on bridging the equity gap in metro Atlanta. In 2016 through six educational and experiential sessions the learning circle journey transitioned to a giving circle – donors realized they could play a role in solutions through collaborative giving. The group is focusing its efforts in the Thomasville Heights neighborhood on Atlanta’s east side. They identified this area as one where, thanks to local residents, momentum is building around neighborhood revitalization and their collaborative giving model can propel direct impact. Their journey will be fully realized in 2017 when grants will be made to bolster the community.



Education: PLUS gives power to the parents

Mom of three Amanda Colclough is on a mission to help parents understand their rights within the school system and to be more engaged in their children’s education. She uses knowledge and training from Parent Leaders United for Students (PLUS), our new grassroots effort to strengthen the parent’s voice through education and grants. When parents are engaged with schools, children typically achieve better grades, test scores and attendance, and demonstrate higher academic aspirations and motivation. Last year, Colclough and a parent committee came up with an idea for a Taste of King Community Block Party, which received a \$1,000 grant. The event celebrated the cultural diversity of Martin Luther King, Jr. Middle School through food, fun and family, to ultimately drive positive change in the community. Nonprofits, health organizations, businesses and high school volunteers joined in to provide activities, food, raffles and information booths. More than 200 kids and parents from King and its feeder schools attended. “They took my idea and ran with it,” she says, proudly. Colclough is now planning monthly activities to increase parent involvement in partnership with the school.



“PLUS helps me understand my rights as a parent within the school system. It provides me with the opportunity to meet different leaders and advocates.”

– Amanda Colclough



Nonprofit Effectiveness: Embrace the future to move forward

Atlanta nonprofits plan to sustain their futures. In 2014, only 30 percent of local nonprofits had succession plans in place. But in the past year, we helped more than 25 local organizations tackle this difficult but vital topic. “Succession planning is something that very easily can be set aside,” says Matt Underwood, executive director of Atlanta Neighborhood Charter School (ANCS). “It could be uncomfortable to talk about if you didn’t have this process.” The Foundation partnered with BoardSource, a national organization, to create an innovative six-month cohort, “Embrace the Future: Succession Planning for Nonprofit Organizations.” Participants received research-based instruction

and individual guidance from an experienced adviser. “You really understand why it’s critical. The perceptions of why you do this changed,” says ANCS board member Lia Santos. The first cohort completed two different plans for succession, emergency and departure-based plans, and participants emerged with greater trust, teamwork and transparency, relationships with other nonprofits and less fear about the future.



“It makes me feel better knowing that there’s a succession plan in place.”

– Matt Underwood, executive director of Atlanta Neighborhood Charter School (ANCS)

Well-being: Sparking better school health through collaboration

Students in Clayton County were missing vital instructional time due to doctor’s visits. Illnesses, as well as immunizations, physicals and well-child checks, caused student absenteeism to rise and productivity to fall. So Clayton County Schools and The Family Health Centers of Georgia brought medical care to them. They created the state’s first health center within a high school. After a series of collaborative discussions with community stakeholders, our Kaiser/Spark Clayton! partnership conducted a health needs study and awarded a grant to this effort to improve access to health services. The North Clayton High School-based center, which provides care for acute and chronic illness as well as prevention and early intervention services, was able to hire an outreach coordinator. “We really needed that support,” says Clayton County Schools’ superintendent Dr. Tamera Foley. Fifteen schools participate in the program and about 13,000 students, and all staff, have access to care. “We’re seeing the growth daily,” says Margarethia G. Bledsoe, the Family Health Centers’ marketing director. Students now return to class, and school officials hope it will pay off in their achievement.



“The Foundation really came in and helped provide for a need.”

– Dr. Tamera Foley, Clayton County Public Schools



Terri Munro: Sound and trusted advice for the journey

Terri Munro, Wealth Advisor with BT Wealth Management in Atlanta, works with high net worth clients that want to leave a legacy, but don't know how to ensure that their wealth and philanthropy will meet their goals.

Terri connects her clients with the Community Foundation. She also participates in our Philanthropic Advisor Leadership Institute (PALI), a joint effort with the Jewish Federation of Greater Atlanta and the United Way of Greater Atlanta that educates financial, legal and accounting professionals regarding charitable planning for clients. She appreciates how the Community Foundation's research into local giving keeps its finger on the Atlanta region's philanthropic pulse.

"My clients trust me," she says. "I need to know and have first-hand knowledge of the firms I choose to recommend, like the Community Foundation."

Terri's passion for philanthropy began at an early age when she volunteered as a counselor at a camp for underprivileged kids. Terri's own participation, empathy and expertise help gain her clients' trust. As a mom of three, Terri also helps independent women become financial leaders in their lives.



"I use the Community Foundation as a resource to ensure my client's giving is being used in a way that they intended." – Terri Munro



Balser Giving Circle: Practice makes perfect giving for Our House

Financial advisors help their clients be philanthropic, driving good in our region. In 2016, 45 advisors practiced what they preach as the inaugural participants in the Balser Giving Circle, where they dug deep into the power of philanthropy to make a difference around income inequality. Curated, exclusive experiences included a robust data deep-dive, an onsite tour of nonprofits working on this vital issue, and impactful interviews with nonprofit leaders on the front line daily. Three

nonprofits were selected to make pitches to the group and at the journey's end, the inaugural participants chose one nonprofit to receive a grant. With a matching gift from the Balser Professional Advisor Council, Our House received \$25,000 to build new private bathrooms in their shelter that serves the most vulnerable homeless Atlanta population – families with newborn babies. And the advisors got to experience the joy that philanthropy spreads.



The Balser Giving Circle is the next step in evolution of the Balser Professional Advisor Council. Since 2007, this partnership between our organization, the Jewish Federation of Atlanta and the United Way of Greater Atlanta has given advisors learning opportunities and tools to integrate philanthropy into their work.



Financial Report | 2016 Overview

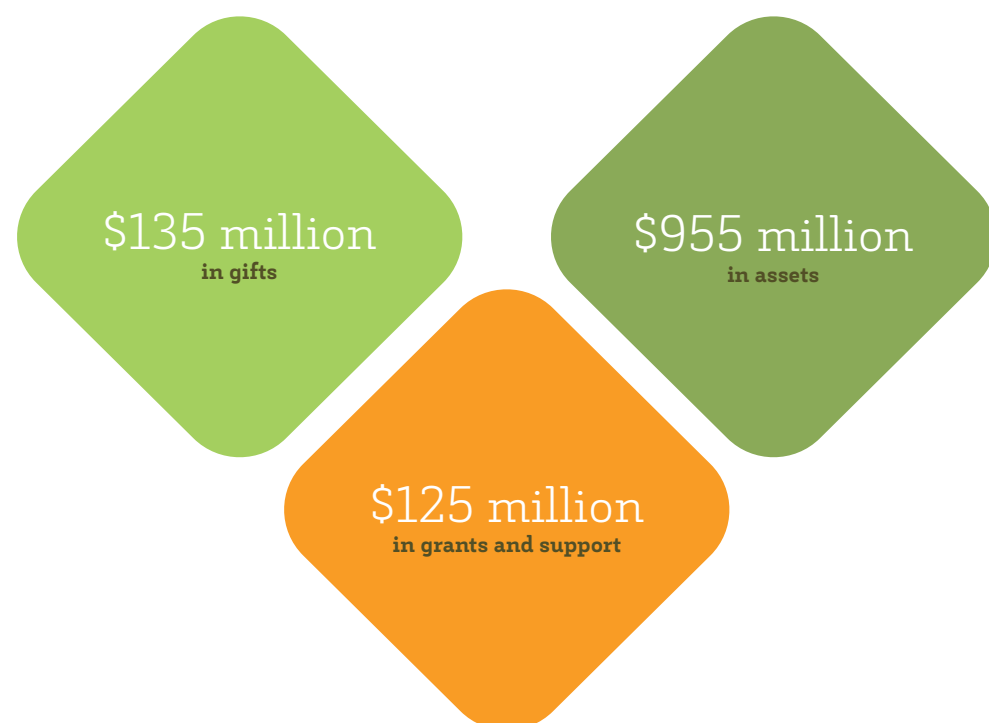
Our vision is to be the most trusted resource for growing philanthropy to improve communities throughout the Atlanta region. A key pillar of that is serving as a reliable steward of long-term philanthropic assets. In 2016, our total assets reached \$955 million. We are committed to managing our operations with excellence so that we can provide maximum impact to our community.

In 2016, the Community Foundation distributed \$125 million in grants and support. This represents 7,300 grants awarded to over 2,400 nonprofits locally, nationally and internationally. Of these grants, 59% stayed within our 23-county metro Atlanta region. Grants were made to over 26 issue areas with the top three being healthcare, education and arts/culture/humanities.

We are deeply grateful to all of the donors whose generosity makes our work possible. In 2016, we received \$135 million in gifts and established 54 new funds. Our most popular giving vehicle, the donor-advised fund, provides donors an immediate tax deduction for their gift to the Foundation and offers time to make thoughtful, heartfelt grant recommendations. Donor-advised funds distributed 79% of our total grants in 2016.

As the investment landscape continues to evolve, we are happy to report that our Investment Pool returned a 7.7% gain for 2016. The Foundation continues to have strong, positive three-, five- and 10-year pool returns: 4.6%, 8.7% and 5.7%, respectively. With capable oversight from our experienced Investment Committee, we will continue to work on achieving the investment goals that are so critical to the Foundation, our donors and the greater Atlanta community.

The financial information contained in this annual report is unaudited and summarized. Please visit cfgreateratlanta.org to view our expanded digital report with detailed 2016 financial information. Our 2016 audited financial statements and 990 will be posted in November 2017. Until then, our 2015 audited statements and 990 are available online.



Our 2017 Team

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Frank Bell
Barbara Bing-Pliner
Suzanne Boas
Edward Croft
Patrice Greer
Sivan Hines, M.D.
Jeffrey Muir

Joe Oesterling
Chip Patterson
Bryan Rand
Teresa Rivero
Joan King Salwen
Dave Stockert
Ramon Tomé
Gregory Vaughn, M.D.

Legal Counsel

Benjamin T. White,
Alston + Bird



Let's get started!

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Erin Drury Boorn, *Senior Philanthropic Advisor*
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Belinda Brady, *Director, Investments*
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VaTonya Brown, *Director, Human Resources*
Janice Burton, *Grants Payable Associate*
Valerie Cox, *Program Officer*
Lisa Cremin, *Director, Community Advancement*
Mark Crosswell, *Director, Social Impact*
Jasmine Daly, *Administrative Assistant, Capacity*
Diana Champ Davis, *Vice President, Capacity and CFO*
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Christy Eckoff, *Director, Gift Planning*
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Carolina Endara, *Marketing Assistant*
Beverly Fooks, *Front Office Receptionist*
Ali Gant, *Gift Planning Officer*
Juanita Gaynor, *Accounts Payable Clerk*
Lesley Grady, *Senior Vice President, Community*
Brian Graham, *Assistant Controller*
Evan Greene, *Donor Database and Portal Manager*
Elyse Hammett, *Vice President, Marketing and Communications*

Kimano Harris, *Accounting Specialist*
Mitch Hollberg, *Database and Analytics Manager*
Audrey Jacobs, *Director, Center for Family Philanthropy*
Lauren Jeong, *Program Associate*
Mindy Kao, *Program Associate*
Jon Katz, *Program Associate*
Allyssa Kiser, *Grants Assistant*
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Staci Lynch, *Philanthropic Advisor*
Kristina Morris, *Program Officer*
Louise Mulherin, *Public Relations Manager*
Hannah O'Neill, *Program Assistant*
Kathy Palumbo, *Public Policy Specialist*
Lita Pardi, *Director, Resource Deployment*
Cedric Smith, *Staff Accountant*
Megan Swett, *Director, Operational Strategy*
Ikepo Talabi, *Senior Accountant*
Kyle Threet, *Investment Analyst*
James Tobias, *Major Gifts Officer*
Kathleen Wagner, *Philanthropic Advisor*
Kellen Walker, *Operations Manager*
Wanda Wallace, *Development Resource and Research Manager*
Sherrie Woods, *Executive Assistant to SVP Community and Volunteer Manager*

**“Two roads diverged in a wood, and I—
I took the one less traveled by,
And that has made all the difference.”**

– Robert Frost



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cfgreateratlanta.org

Connecting passion with purpose