the giving life

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Welcome to The Giving Life! We invite you to peek inside and learn what’s new in the world of Atlanta philanthropy.

You are part of a special club. You are truly the epitome of ‘the giving life’ through your actions. You have super powers. You make our region better. Through your influence, we are making notable strides to improve the arts, education, community development and more. You continue to push us to move the needle, to strive for purpose.

How? The giving life is a world where possibilities persist and innovation drives impact.

Read about:

- Managing for Excellence, the pinnacle of performance amongst nonprofits
- A partnership with StateFarm that empowers young people
- GoATL, a cutting edge investment fund that redefines philanthropy
- Get to know our new VP of philanthropy, Terry Mazany, who elevated our counterpart in Chicago, the Chicago Community Trust, to record-breaking achievements

Finally, please mark your calendar for some upcoming, not-to-be-missed, exclusive donor engagement opportunities. Find details in Donor Central:
- August 2, Investment Briefing
- August 18, Planet Philanthropy
- October 11, Joy of Philanthropy, an evening with author Richard V. Reeves

I value your time, commitment and dedication to improving Atlanta’s region more than you know. Together, we are living the giving life!

Respectfully,

Alicia Philipp
President

Thank you!

To our donors, we say The Community Foundation for Greater Atlanta would not exist without the generosity of donors like you, who are driven to be a force for good in our community. Thank you for choosing us to be your philanthropic partner. We are delighted to be a part of your philanthropic family.
Working to make strong nonprofits stronger: Meet our 2018 Managing for Excellence Award recipients

At the Community Foundation, we know that strategic, strong nonprofit organizations are the most effective and impactful in our community. That’s why each year, our Managing for Excellence Award recognizes exemplary nonprofits that are innovative, thoughtful and fiscally sound, with a commitment to continuous improvement. The 2018 Managing for Excellence Award recipients are Synchronicity Theatre and YMCA of Metro Atlanta.

Synchronicity Theatre offers diverse programs that challenge the mind and build empathy through the creation of new theatrical work that empowers females, like its Playmaking for Girls program. Synchronicity has a strong culture of planning, is forward-thinking and has become a critical component of the Atlanta arts ecosystem.

The YMCA of Metro Atlanta has served the Atlanta community for 160 years, promoting healthy lifestyles and equal opportunities to learn and grow. As Atlanta has grown, the YMCA has responded with new programs to meet the unique needs of children and adults, while demonstrating sound financial management, strong governance and a commitment to strategy.

Each organization will receive a robust award package including a $75,000 grant, consulting services from our partners at Boston Consulting Group and marketing and recognition opportunities.

Upcoming donor events

In August, the Community Foundation will host two engaging and important events for our donors:

Thursday, August 2
Learn how the Foundation invests and stewards your philanthropic dollars.

Saturday, August 18
Donors’ children and grandchildren will spend the day at Trees Atlanta at Planet Philanthropy to learn the basics of giving while having fun!

Visit cfgreateratlanta.org/donor-events to learn more.

2018 Managing for Excellence Award recipients Synchronicity Theatre (photo: Daniel Parvis) and YMCA of Metro Atlanta
State Farm partnership grows future change-makers

All you need is passion to make a difference, but a few tools and know-how certainly help make an impact! In partnership with State Farm, the Community Foundation for Greater Atlanta is giving an energetic cohort of college students a chance to make a change in their community through a new program launched this summer.

The local State Farm Scholars Philanthropy Program will train 10 rising sophomores at Georgia State University’s Perimeter College in Decatur about the art and science of grantmaking, with a focus on south DeKalb County.

The students are having fun over the summer, learning about community challenges impacting the county and the critical strategies nonprofits use to improve safety, education and community development for all residents. Through this interactive philanthropic workshop series, students will award micro-grants to a set of organizations serving the south DeKalb community through the newly established State Farm Education Assist Fund. As one student said, “It only takes you to start a movement!”
“I am interested in philanthropy because I believe that giving back to the community without expecting anything will help inspire others to do the same.”

Zachary Thomas, State Farm scholar
Invest. Impact. Repeat.

GoATL Fund provides cost-effective loan capital to advance regional social impact

The Foundation has launched Georgia’s first impact investment fund, the GoATL Fund. Impact investing seeks innovative, strategic ways to advance capital to amplify the work of nonprofits and social-purpose for-profits that address the region’s greatest needs.

Unlike traditional philanthropy through grantmaking, GoATL’s investments are flexible, cost-effective loans that are expected to be paid back, recycling dollars to fund new initiatives.

GoATL invests through third-party organizations such as Community Development Financial Institutions (CDFIs) that have the expertise for how to direct loan capital toward critical needs in our region.

GoATL has made two investments to date. Funding to Atlanta Neighborhood Development Partnership, Inc. bolsters its successful single-family revitalization programs that expand housing affordability in neighborhoods still recovering from the foreclosure crisis. A second investment was made to Access to Capital for Entrepreneurs, partnering with the Small Business Administration, to support entrepreneurs in underserved populations and communities.

Access to Capital for Entrepreneurs supports entrepreneurs in underserved areas.
Impact Investing: How GoATL Works

1. The Foundation and donors invest in GoATL as a way to sustain greater social impact in the metro Atlanta region.

2. Financial partners, such as nonprofit banks, receive funds for investment in the community.

3. Worthy nonprofits and social enterprises gain access to flexible, cost-effective loans that expand their impact.

4. GoATL’s investments finance affordable arts facilities, charter schools, housing, low-income clinics and more.

5. Over time, the loans are paid back and the impact is recycled.

Investments will support our five Impact Areas:
- Arts
- Community Development
- Education
- Nonprofit Effectiveness
- Well-being

GoATL launched with $10 million from the Foundation’s unrestricted funds. Stay tuned—opportunities for donor investment will be available in 2019!

Interested? Contact Mark Crosswell, managing director, impact investing: mcrosswell@cfgreateratlanta.org.
Foundation Happenings

At the Community Foundation, we are all about connections. Connecting donors to each other for conversations and incredible experiences. Connecting professional advisors for shared philanthropic learning. Connecting ourselves to partners and knowledgeable community experts.

It’s these connections that forge impact and enable us to better understand the issues and opportunities that our region is facing – and better serve you. Here are some of our recent connections and happenings.

On May 1, Community Foundation donors and friends attended The Center for Family Philanthropy: Celebrating the Generations at the landmark Rhodes Hall, where Dr. Phil Gwoke discussed multi-generational philanthropy.

On April 3, guests saw African American art through the eyes of collector and Atlanta philanthropist Paul R. Jones at our donor event at the Museum of Contemporary Art Georgia (MOCA GA).

The Balser Philanthropic Advisor Leadership Institute (PALI) Class of 2018 completed their year-long journey together on May 16. The class of 26 professionals grew their understanding of the values that motivate philanthropic clients.
The 12th annual Balser Symposium, a partnership between the Atlanta Jewish Foundation, United Way of Greater Atlanta and the Community Foundation, took place on February 2.

Community Foundation staff enjoyed their first team picnic at Piedmont Park on June 1. Staff enjoyed food and fun through the sun and the rain.

On May 7, the Community Foundation assembled a curated group of experts on each of our Impact Areas to gain perspective on making regional impact.

The Foundation’s Lisa Cremin received the first-ever Respect Award from True Colors Theatre Company for her work as an influencer and advocate for the arts on June 2.

Our Board of Directors gathered at the Grady Health System Ponce de Leon Center for a deep dive into our Well-being Impact Area, with a focus on HIV/AIDS, at a retreat on April 10.

INTERESTED IN UPCOMING EVENTS? Visit cfgreateratlanta.org/donor-events
Did you know that if you leave your retirement fund assets such as your IRA or 401(k) to loved ones, these assets may be reduced by half or more due to taxes? However, those assets can continue to work for the greater good if you make a gift to charity as part of your estate plan.

If you name the Community Foundation as the beneficiary of your retirement plan, your unused benefits will be distributed upon your death to the Foundation, free of both estate and income taxes.

There are some special considerations for Roth IRAs or annuity plans; consult your financial advisor about any specific questions regarding these. To make a gift of your retirement plan assets or for questions about our planned giving services, please contact Christy Eckoff at 404.588.3183 or ceckoff@cfgreateratlanta.org.

Giving tip: Plan ahead for retirement plan assets

From Christy Eckoff, managing director, philanthropic counsel

Your gift can create a permanent, named charitable fund that makes gifts according to your wishes. You may also add to an existing donor-advised fund.

Retirement plans appropriate for charitable giving include:

• Profit-sharing or other defined contribution plans
• 401(k) plans
• 403(b) plans for employees of nonprofit organizations
• Individual Retirement Accounts (IRAs)

Donors’ children and grandchildren will be immersed in philanthropic fun at Planet Philanthropy on Saturday, August 18 at Trees Atlanta. Visit cfgreateratlanta.org to learn more.
Q&A with Terry Mazany, senior vice president for philanthropy

So Terry, your vocational journey is inspiring. Tell us about your decision to join the Foundation after the Chicago Community Trust? Alicia is a nationally revered leader among community foundations and sets the standard for us all. To have a chance to work with her and contribute to Atlanta as a vibrant and growing community was irresistible.

What excites you the most about becoming a part of the community here in the ATL? Atlanta has soul and a strong sense of identity. It is clearly a city looking to the future, building on an impressive legacy of great ambition and public works. Personally, I will be closer to family. And I can’t deny the attraction of milder winters!

Share life lessons from your years at the Chicago Community Trust that you believe will impact your work here. We are deeply rooted to the community by the generosity of donors who express their love and concern for this place through their giving. Community foundations are all about service: to donors who contribute capital, to nonprofit organizations that put that capital to best use and to the communities and residents who stand to benefit the most.

What are the greatest challenges philanthropists face in the 21st century? Why? Atlanta has all of the ingredients to create a place that works for everyone, where opportunity abounds and prosperity is shared; that makes wise use of its natural resources; a place that innovates solutions to these most pressing needs. Philanthropy is the way to address these challenges! And while philanthropy cannot do it all, the Foundation is well-positioned to help donors find ways to make the greatest difference.

Need summer activities for kids? Give time, talent or treasure!

Children and teens are natural philanthropists because they have the time, energy and spirit to support those around them. This summer is the perfect time to get involved in your community, raise funds for great causes and volunteer as a family. Here are some ideas:

Grades K – 2: Help your child with a lemonade stand to raise money for a special cause.

Grades 3 – 5: Surprise friends or neighbors by writing kindness messages in sidewalk chalk on their driveways.

Grades 6 – 8: As you plan the family calendar for the next month, reserve one day for volunteering and discuss as a family what to do.

Grades 9 – 12: Plan a cleanup day at a school or park.

At the Community Foundation, we excel in teaching children and young adults about gratitude, compassion and caring, while offering suggestions for what nonprofits would be a great fit for your family’s interests and values! Reach out to your philanthropic officer for more resources.

Want more ideas on how to encourage philanthropy in kids? Contact your philanthropic officer for a copy of our PhilanthropyATL publication.
Summer Reading

Imagine the sand in your toes, an enormous umbrella over your head and a fabulous stack of provocative books closeby. What’s your favorite read of the summer? We asked our President, Alicia Philipp, what was on her list, and she gave us a compelling selection of thought-provoking offerings. Her list is full of narratives that shed light on some of the challenges facing us all today.

DID YOU KNOW? At the Community Foundation, we offer a monthly book club review, shared with our donors via our newsletter and our blog. Sign up for our newsletter at the bottom of our website at cgreateratlanta.org.