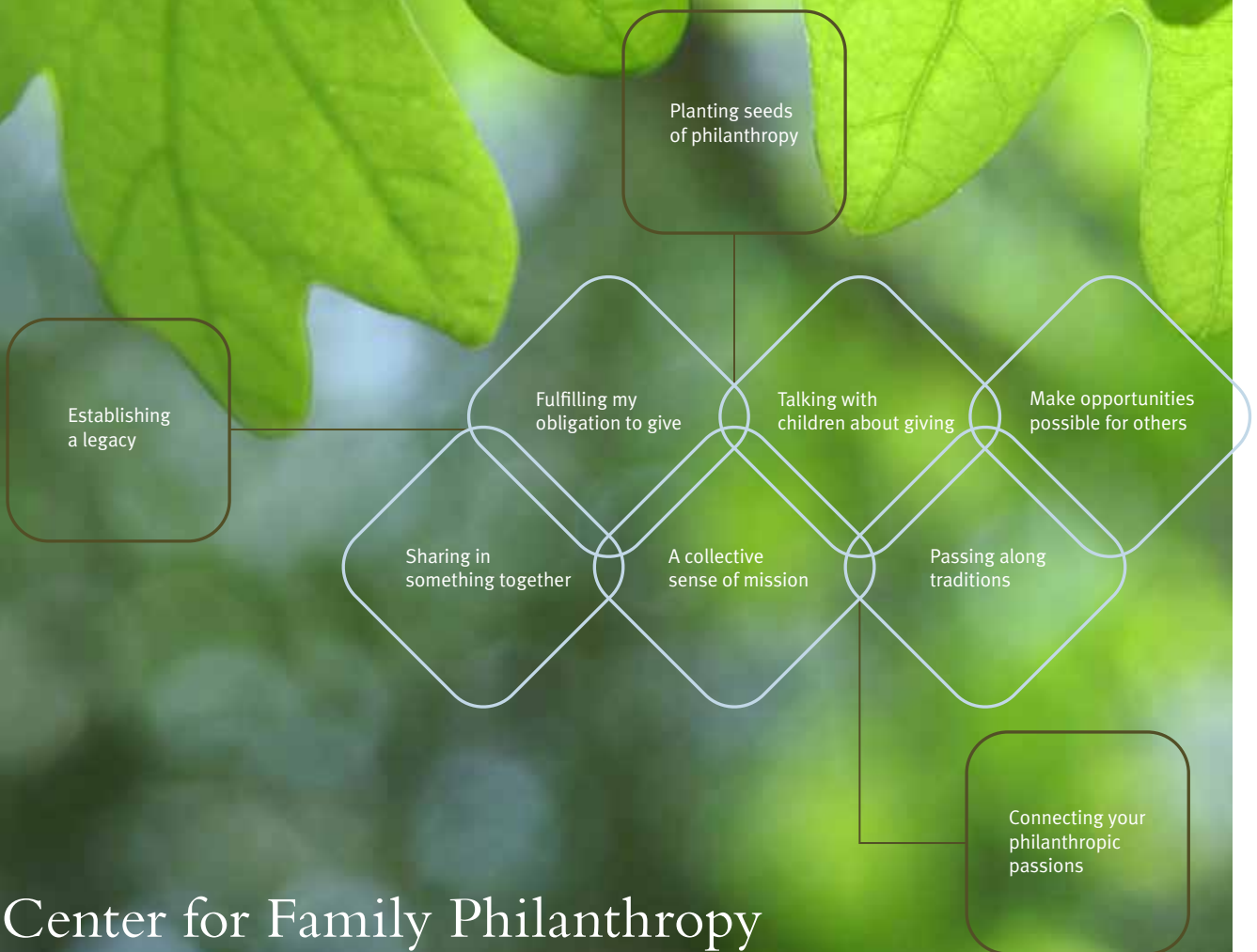




The Community Foundation
FOR GREATER ATLANTA



Center for Family Philanthropy
Helping families grow in new directions

The Center for Family Philanthropy

helps donors of The Community Foundation more deeply address their charitable giving. This guide was developed to show how the Center can help individuals and families in the Greater Atlanta region grow in new directions in their local communities and beyond. It is our goal to provide you the information, resources and customized service to strengthen your philanthropy. Learn how we've helped families over the past 10 years connect their passion to purpose and engage their families in philanthropic activities. Read more about our engagement opportunities and events, how we're preparing the next generation of philanthropists, and get to know just a few of the individuals and families with whom we've had the pleasure of working.

Our director of the Center for Family Philanthropy is always available at 404-588-3194 to discuss any questions you may have, and our website, www.cfgreateratlanta.org, has extensive information and updates on The Community Foundation and our services.

ABOUT THE CENTER FOR FAMILY PHILANTHROPY

The Center for Family Philanthropy was launched in 2000 to provide donors at The Community Foundation a virtual place to grow their philanthropy. We saw that some of our donors wanted to learn and become more involved in the community. Others were interested in more effective and strategic giving. And many also wanted assistance with engaging multiple generations of their family in philanthropy.

Today, the Center for Family Philanthropy is a unique aspect of The Community Foundation with more than 200 members. For donors with funds at the \$250,000 level or greater, or who have a planned gift to the Foundation of \$1 million or more, the Center offers a high level of customized service and donor engagement. We use a multi-generational approach to philanthropy enabling donors to fulfill their passions at a level that

is right for them at whatever life stage they may be. We then help them connect their passions to nonprofits making a difference.

You may be recently retired and a new grandparent now thinking about the legacy you want to leave. Or you may be a busy, young family with a desire to incorporate philanthropy into your lives early on. Perhaps you are someone who has worked tirelessly for many years and now has time to fully explore your philanthropic passions, and become more involved with issues and causes you care deeply about. Wherever you are in your life, our team of expert professionals is here to apply our in-depth knowledge of the issues and community to meet your philanthropic needs.

OUR SERVICES

When a donor establishes a fund of any size at The Community Foundation, that individual or family is offered a wide range of personalized service. Our standard level of service provides donors with an assigned philanthropic advisor, administration and oversight of gifts to and from their fund, access to the knowledge and experience of the Foundation, as well as educational

The Center for Family Philanthropy is a virtual place within The Community Foundation for Greater Atlanta. It is a place where individuals, couples, families, including multi-generational, extended and blended, can come together to explore their individual philanthropic goals as well as engage in philanthropy in a collaborative way.



opportunities and events throughout the year. Center for Family Philanthropy members receive this standard service, as well as a deeper level of service customized to fit their individual needs. Additionally, Center for Family Philanthropy members have further investment opportunities, including the ability to recommend an investment advisor of their choice.

With a fund at the Center for Family Philanthropy level, your giving grows at The Community Foundation with access to more personalized services and a myriad of opportunities for a high level of engagement. You'll begin by meeting with your philanthropic advisor – your personal advisor providing you access to extensive knowledge about issues in our region, the organizations making an impact on those issues and smart giving approaches when choosing how to invest in a nonprofit. Your philanthropic advisor is your window to the Foundation. As your first point of contact, this person is your coach, guide and expert resource.



Below is a list of the services we provide Center for Family Philanthropy members:

- Long-term philanthropic planning, including mission, vision statements and legacy planning
- Managed grantmaking process – from proposal solicitation to evaluation
- Customized engagement opportunities – family genograms, family timelines
- Family philanthropy engagement – family meetings, agency site visits
- Invitation to special events for Center for Family Philanthropy members

Events like our Annual Meeting allow donors the opportunity to learn and share with us and build camaraderie and enthusiasm around philanthropy.

Family philanthropy is the act of engaging in philanthropy with one or more people who define themselves as family. It is the process of learning about each other, learning about issues that matter to you, learning about critical needs facing your community and finding ways to address those needs together.

The Salwen Family



The Salwens believe that life is more than accumulating; ultimately it's about giving. Their decision in 2008 to sell their Atlanta “dream house,” move to a home half its size, and give away half of the sales price was a statement of that belief. According to Kevin, this experience and the family’s philanthropy in general has been a great tool for the family’s connectedness – and his children’s growth. “Once we decided to sell our house, all the decisions concerning where we would use the funds and how we could make the most difference were made as a family; one person, one vote. Our kids knew that their voices would be heard,” he says. “In coming together for something greater than ourselves, we found a collective sense of mission and purpose. We set out to make a difference and ended up transforming our lives.”

You can read more about the Salwen’s journey together in “The Power of Half: One Family’s Decision to Stop Taking and Start Giving Back” (Houghton Mifflin Harcourt).

A collective sense of mission

DEVELOPING YOUR PHILANTHROPIC PLAN

Creating your personal philanthropic plan helps you map out your giving over time. This plan may change as your approach to philanthropy evolves, but it will hold us accountable to you and help you determine the extent to which you are meeting your goals. We develop your plan by talking about what matters most to you – your values. We then work with you to connect those values to areas of interest. We also look at your past history of giving. To what extent was your giving in alignment with your interests? Were your grants “honored obligations?”



Donors at our annual Center for Family Philanthropy event.

Were they passionate or strategic? What impact did your grant have on the nonprofit organization? What impact did your grant have on you? Were they transformative? These questions will help us develop a plan that meets your specific needs.

Below are additional questions that might be asked when developing a philanthropic plan:

- What do I want to achieve over the course of the year? Ultimately?
- Do I want to make a large grant up front? Do I want to structure my grants over time?
- Do I want to engage my family?
- What impact will my gift have?
- What giving strategies do I want to use?
- What legacy do I want to leave?
- In what ways do I want to support nonprofits (e.g., general operations, nonprofit effectiveness, programs, public policy and civic engagement, etc.)

GRANTMAKING

Working with The Community Foundation affords you the opportunity to be strategic in your philanthropy and fulfill your honored obligations as well. You want your grant dollars to have an impact in the community, and we are here to help you ensure that they do. With a team of professional staff with expertise in the critical issues facing the region and the best methods to invest in nonprofits, we are able to assist you with grantmaking. We can manage the entire process for you and offer a host of services to help you with this process:

- Identifying nonprofit organizations that meet your strategic priorities
- Issuing Requests for Proposals (RFP) from nonprofit organizations
- Conducting the necessary due diligence and organizational assessment
- Processing grant checks and end of grant reporting

- Coordinating visits to nonprofit organizations and presentations
- Preparing written organizational summaries to share our knowledge
- Helping you identify other philanthropists with whom you may collaborate

Perhaps you would like to involve your family in grantmaking yet you live in different places? We customize our services to meet the needs of our donor families. Teleconferences, family websites and annual family meetings are just a few activities we employ to bridge the gap for geographically dispersed families. For all our families, a philanthropic advisor serves as their coach and guide throughout the entire grantmaking process. We will not tell you which organizations to fund. Instead we share our knowledge of high performing and high-capacity organizations with you and help you make a recommendation based on your criteria, values and interests.

Fulfilling my obligation to give

Sunny Park

Sunny Park admits he used to be a “professional taker” – at least during the early parts of his childhood. Growing up in Korea, he recalls the excitement of receiving gifts and tokens from missionaries and American soldiers. One experience has been lasting. “One day I came across a soldier who had an orange in his pocket; the first I had ever seen. I was determined to get that orange,” Park remembers. And he did. But his joy soon changed once his mother told him they were to give the orange to a neighbor whose son had recently died. “I cried and just couldn’t understand why she wanted to give it away. I thought she was crazy,” he says. Seeing the expression on his neighbor’s face after receiving the gift, that day Park realized the delight that can come from giving. Today, Park works with The Center for Family Philanthropy as an individual deeply involved in philanthropy. “I give not only for others but for me as well. I get rewarded. It feels good,” he says. “I’m fulfilling my obligation when I share what I have been given – love, wisdom, strength and money. I believe God has given me these gifts to use wisely,” he says. A former Board member at the Foundation, Sunny Park is a successful entrepreneur, a USO Patriot award recipient, a national and community leader, a philanthropist and an inspiration to the many lives he’s touched through his giving.



Sample Values Statements

1 *Our fund seeks to promote love, creativity, peace, passion, family, freedom, respect, simplicity, integrity, commitment, and joy in the lives of others.*

2 *We believe in a community that takes care of its children, animals and environment. We seek to support organizations that are creative, committed, and peaceful in their approach.*

3 *Our environment, our children, our animals, and the art around us bring our family the greatest of joys. We seek to help organizations that are dedicated to promoting these areas of interests for all people.*

INVOLVING THE FAMILY IN PHILANTHROPY

One aspect of your philanthropic plan may include engaging your family in philanthropy. At The Community Foundation, we define “family” broadly to meet your needs. We work with donors with adult children, young children, adopted children, blended families, partners, in-laws, grandparents, aunts, uncles and cousins. Our philanthropic advisors are trained to work with families of all ages and all types, helping them better understand each other’s perspectives, values and generational dynamics.

We bring a wealth of knowledge and a variety of tools to engage you in the planning process – values and interest cards, generational lens exercises and more. We can conduct these exercises with you and your family and help you develop a Family Timeline, Family Tree or a Family Genogram. In addition, some families and individuals enjoy the development of a Values Statement or a Mission Statement as an overall guide to their philanthropy.

Once a family has focused on individual and collective interests, we can help with navigating the waters around grantmaking. Each family is different. Whether it’s making collective grants, providing each member a specific amount for individual grantmaking or a combination of both, we work with Center members to decide which strategies work best to achieve the family’s philanthropic objectives. Your philanthropic advisor is also skilled at guiding families through governance issues or family dynamics, providing ways for various members to share leadership and even cultivate new leaders.

For many of our donors, leaving a legacy is important. Sharing one’s legacy with family and friends is a way to remind loved ones of what matters most. From a simple written legacy statement or letter, to a videotaped or recorded interview, we can help you share your tradition with generations to come.



Margaret & Bob Reiser and family

Both Margaret and Bob Reiser were active in Atlanta’s nonprofit sector when they met. After they married, they decided to have their new blended family participate in a fund at The Community Foundation. In 2007, Margaret and Bob Reiser, her two children, his two children along with their children’s spouses, participated in their first family meeting. Together, the family discussed their values and interest areas, developed a family values statement and even a name for their fund: The Giving Mutt Family Fund. “Some members participated in person, others through teleconference. From the beginning, The Community Foundation has been creative in addressing our unique family’s needs,” says Margaret. Each year, this geographically-dispersed family, representing Georgia, Arizona and Chicago, conducts a formal grant cycle to support nonprofits that match their passions. “We wanted to have them share in something together and get them excited about giving and working with nonprofits as individuals. That was our goal and the Foundation has supported us tremendously,” she says.

Sharing in something together

The Rollins Family

“It’s been really important for us to educate the younger generations about our family’s history and tradition of giving. It’s all about not forgetting the roots,” says Amy Rollins Kreisler. The roots Amy refers to are those of her grandparents, O. Wayne and Grace Crum Rollins. In 2000, the Rollins family added The Community Foundation as one of its multiple giving vehicles, with more than 30 members participating in the family’s philanthropy. “It’s been great to have these discussions around nonprofits, grantmaking and how to turn passion into service and giving,” says Kreisler. For the Rollins family, The Community Foundation has conducted multiple engagement activities including values and generational lens exercises and customized grantmaking workshops. “As the family grows, it’s a challenge to remind the younger members of my grandfather’s beginnings. He grew up on a farm in northwest Georgia. He wasn’t able to attend college. Education and public health were important to him. Giving back was necessary to him,” she says. “These are traditions we want to pass along.”



ENGAGEMENT OPPORTUNITIES & EVENTS

We recognize the tremendous insight and knowledge our donors have. Throughout the year, we offer specific opportunities to share information with you to grow that knowledge even further. These engagement opportunities provide you the opportunity to exchange ideas around the critical issues faced by nonprofit organizations serving individuals and families in our communities. Our *Smart Giving Series* focuses on several key areas:

- Identifying and evaluating high-capacity and high-performing nonprofits
- Understanding the importance of policy, advocacy and research
- Measuring impact and outcomes of nonprofits
- Collaborating with other donors and grantmakers to strengthen philanthropic investments

In addition to customized research on organizations or areas of interest, we offer multiple resources focused on specific giving strategies.

Give Well: A Guide to Investing in Atlanta’s Nonprofits focuses on giving approaches to provide you with additional ways to fulfill your philanthropic goals. Such giving

approaches include support for general operations, research and analysis, public will and civic engagement, nonprofit effectiveness and specific projects.

Impact Philanthropy provides information about the ever-changing needs of our Atlanta region. Through this series, we address a critical current issue such as arts and culture or crisis assistance, providing donors with an overview of the issue area and key organizations working to address the needs.

An Extra Wish gives donors the opportunity to support the essential, immediate needs of a nonprofit organization within our 23-county region. These “wishes” are typically small tangible items such as backpacks for children, beds for shelters or updated office equipment to help the nonprofit strengthen its operations.

Throughout the year, we also offer specific events tailored to our Center for Family Philanthropy members. Our annual Center for Family Philanthropy workshop allows us to share current research, activities and trends in family philanthropy, and our Annual Meeting, Annual Donor Appreciation events and periodic community tours for donors help us grow further donor engagement and involvement in philanthropy.

Passing along traditions



The Patterson Family

Today donors of The Community Foundation are teaching their children at an early age the value and fulfillment that come with philanthropy. Chip and Shawna Patterson are such donors. They along with their four children, who range in age from four to 15, are passionate about issues related to children and families. “Activities like our visit to the Atlanta Children’s Shelter have really opened up their eyes,” says Chip. “We talk with them about those living in difficult circumstances and the good that comes from giving. Already, our 11 year old is thinking about what she can do to make an impact. The wheels are turning now,” he says. The Pattersons hope to steer their children in the right direction early, helping them to become aware of their community and the importance of being involved. Their desires are long-term as well. “If we can leave four children in this world with a strong base of philanthropy, then hopefully we quadruple the difference we’ve been able to make.”

Talking with children about giving

PREPARING THE NEXT GENERATION

Many of our donors have chosen to engage their young children in philanthropy. Through the Center we have found there are multiple ways to engage youth around philanthropy and help it to grow. As early as the age of five, children learn the importance of caring for others and caring for their community. In fact, many begin at this age to identify their own interests. Family philanthropy can provide parents the opportunity to share their interests, passion and legacy with their children. It is also an opportunity for children to articulate their own voice and learn about the practical aspects of philanthropy.

PLANET PHILANTHROPY

As one of the signature features of the Center for Family Philanthropy, our annual Planet Philanthropy program allows children, grandchildren, nieces, nephews and friends of donors the opportunity to collaborate with emerging philanthropists between the ages of 6 and 18. During this half-day event, participants learn how to review and evaluate grant proposals, work collaboratively with others and have the opportunity to award grants to nonprofit organizations

of their choice. Foundation staff work with participants to develop a theme for the day and incorporate opportunities for the entire family to engage in service.

Previous Planet Philanthropy days included a focus on hunger at the Atlanta Community Food Bank, philanthropy at the Fernbank Museum of Natural History, the environment at Trees Atlanta and a special program for our youngest philanthropists at Imagine It! The Children’s Museum of Atlanta. Planet Philanthropy affords us the opportunity to engage our donors’ children, creating the next generation of philanthropists and planting seeds for the future.

“NEXT GEN” PHILANTHROPY

Research tells us that there will be a significant transfer of wealth in the next few decades. Our work has taught us that many of our donors are interested in engaging their adult and young adult children around philanthropy. Many of our Center level donors have children and other family members between the ages of 18 and 40. This younger generation approach philanthropy quite differently than their predecessors with a unique set of values, interests and ideas around how to make a difference.

We are increasingly working with this next generation of philanthropists providing them space to have their own voice and fulfill their philanthropic passions while collaborating with parents and grandparents from whom they may inherit wealth. Some of our fund advisors choose to designate a portion of their fund for their children to participate in grantmaking. We may work with these “next gen” philanthropists to identify their passions and interest areas. In addition, many of these donors are interested in giving their time, so we can also discuss ways in which they might get involved through volunteer opportunities and/or nonprofit board and leadership roles.

SERVICES TO FAMILY FOUNDATIONS

Many donors who establish private foundations also maintain funds at The Community Foundation in order to access our services and expertise. If you have a private foundation, we offer strategies to help you manage your giving. While The Community Foundation does not perform back-end administration, we can assist you in the following ways:



- Customized services through our Center for Family Philanthropy for a negotiated fee
- Philanthropic planning and strategic grantmaking
- Information and education services
- Legacy services

Please contact us directly for more information.

Planet Philanthropy events invite younger family members to embrace philanthropic notions by communicating them in a way that is both educational and fun.

Dr. David and Nola Satcher

The spirit of giving was instilled in Dr. David Satcher very early on. “Growing up on a small farm in rural Alabama, I remember my mom taking milk from our cow to others, as well as the vegetables we grew,” he says. “We appreciated the fact that you were supposed to share with others.” This value has stayed with Dr. Satcher throughout his life and it’s one he has developed in his own family. As director of The Satcher Health Leadership Institute at Morehouse School of Medicine and the 16th Surgeon General of the United States, Dr. Satcher has dedicated his life to improving the health of others. He credits the values of hard work and integrity, which he inherited from his parents, as keys to his success, and ideals he and his wife pass along to their four adult children and grandchildren. “Living through the Civil Rights movement showed me that I could be a part of change. I realized then that you don’t have to accept things the way they are,” says Satcher. “My wife and I have always had this desire to inspire and make opportunities possible for others. We see that the gifts we have given to our children have translated into their own personal successes and in helping improve the lives of others.” Satcher hopes the life he and his wife have lead will be a testament for the generations to come. “You make a living out of what you get. You make a life out of what you give,” he says.



Making opportunity possible for others



Planet Philanthropy participants listen to presentations from nonprofits.

Establishing
a legacy

Connecting your
philanthropic
passions

Planting seeds
of philanthropy

GIVING OPTIONS

The Community Foundation has the experience and expertise to facilitate any type of charitable gift—from simple gifts of cash to complex planned giving transactions. In addition to cash, we can accept many kinds of assets including gifts of publicly traded or restricted stock, mutual funds, bonds and other debt obligations, real estate and intangible/intellectual property. And because we are a public charity, you receive the most valuable charitable tax deductions available by law for both income tax and estate tax purposes.

You may establish (and later add to) any of The Community Foundation's various fund types by contributing a variety of types of assets during your lifetime. Direct current gifts generate the most beneficial charitable income tax deduction available under the law, while at the same time removing the contributed assets from your estate for estate tax purposes. You may also add to your fund or create a new fund at The Community Foundation with a gift from your estate.

A deferred or planned gift allows you to become a member of our Legacy Society and take advantage of many of the opportunities available to current donors. Potential planned giving techniques include bequests,

life insurance, a charitable remainder trust, charitable gift annuity, retirement accounts and charitable lead trusts.

INVESTMENT OPTIONS & FEES

Donors to The Community Foundation may request that their fund be invested according to one of four investment options: The Community Foundation Pool – a diversified portfolio of assets invested broadly among institutional money managers; American Fund Option – a diversified portfolio of American Fund mutual funds selected by the Foundation's investment committee and purchased without commissions; Money Market Option—a standard money market fund that is appropriate for funds wishing to protect principal and avoid market risk while earning money market rates of return; and Individually Managed Option—donors with fund balances of \$250,000 or more are able to recommend the investment advisor of their choice to manage the assets in their funds.

In exchange for the services we provide to you, The Community Foundation charges an annual administrative fee against the balance of each fund. The fee for Common Good Funds and scholarship funds fully administered by The Community Foundation is 85 basis points (i.e. .85%) per year. For donor-advised funds, designated funds and

The Center for Family Philanthropy is here to help individuals and families branch out and grow in new directions. Join us as we learn more about the community, explore effective and strategic giving, and engage the next generation of philanthropists. We look forward to helping you invest in nonprofits and fulfill your passions.

scholarship funds where the Foundation does not administer the selection of recipients, the annual fee is tiered according to the following fee schedule:

- ♦ First \$100,000 100 basis points
- ♦ Next \$400,000 85 basis points
- ♦ Next \$500,000 70 basis points
- ♦ >\$1 million 65 basis points

Investment management fees are separate from our administrative fee and vary depending on the investment option requested by the donor. The Community Foundation does not receive any fee revenue from the investment management of funds that it maintains. Visit our website at www.cfgreateratlanta.org for complete fee information.



RESOURCES

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Websites

21/64 – www.2164.net

Association of Small Foundations – www.smallfoundations.org

National Center for Family Philanthropy – www.ncfp.org

Council on Foundations – www.cof.org

DoSomething.org – www.dosomething.org

Next generation philanthropists at our Next-Gen event at Park Tavern in Atlanta.

Our Mission

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

Founded in 1951, The Community Foundation for Greater Atlanta connects donors, nonprofits and community leaders to strengthen the Atlanta region through philanthropy. We improve communities by helping people invest in nonprofits. The Foundation works directly with donors and their families to make charitable giving more powerful, effective and easy. Through our quality service to donors and innovative leadership on community issues, we improve the quality of life for residents in our region. We accomplish this through our four key goals, 1) engage our community, 2) strengthen our region's nonprofits, 3) advance public will, and 4) practice organizational excellence.



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Photo credits: Salwen family, Allison Shirrefs; Patterson family, Christopher Herrin



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