

KEY FACTS ON GEORGIA FOUNDATIONS

SELECTED GRANTMAKER DATA,¹ 2009

In 2009, there were 1,455 independent, corporate, community, and operating foundations in Georgia. This represented a 3.1 percent decline in the number of foundations from the previous year. Assets for all Georgia foundations rose slightly to \$11 billion, showing signs of stabilizing following a record 18 percent decline in 2008. While giving by all U.S. foundations fell 2.1 percent in 2009, total giving by Georgia foundations grew a surprising 7 percent, largely as the result of an increase in giving by several key funders.

¹The Foundation Center's grantmaker database includes all non-terminated independent, corporate, community, and operating foundations. Sources of data for these foundations include IRS information returns (Form 990-PF), foundation reports, and information reported to the Foundation Center on annual surveys of foundations with assets of at least \$100,000 or giving of \$50,000 or more.

Summary Statistics for Georgia Foundations, 2009

Foundation Type	No. of Foundations	%	Assets	%	Total Giving	%
Independent	1,289	88.6	\$8,702,726,094	79.4	\$544,491,556	62.3
Corporate	59	4.1	437,080,615	4.0	139,997,279	16.0
Community	13	0.9	951,780,763	8.7	176,146,777	20.1
Operating	94	6.5	869,298,405	7.9	13,571,674	1.6
TOTAL	1,455	100.0	\$10,960,885,877	100.0	\$874,207,286	100.0

Note: Figures exclude non-grantmaking foundations and grantmaking public charities.

\$874 million

Giving by Georgia foundations in 2009

1,455

Number of grantmaking foundations in Georgia in 2009

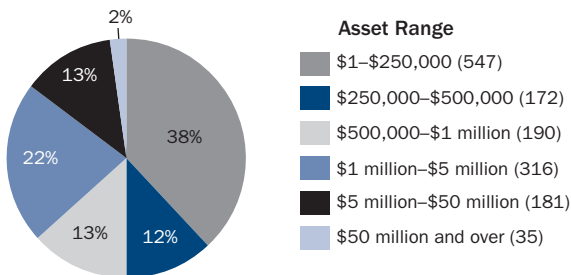
6.5%

Share of Georgia foundations reporting more than \$1 million in giving in 2009

Health

Top-ranked field by share of 2009 grant dollars for Georgia grantmakers—36.5%

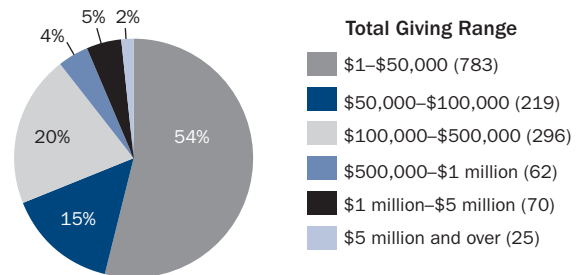
Half of Georgia foundations held more than \$500,000 in total assets in 2009



Percent of Number of Foundations

Note: Based on 1,455 grantmaking Georgia foundations. Actual number per category shown in parentheses. Due to rounding, percentages may not total 100. Fourteen foundations reported having no assets.

Close to half of Georgia foundations gave more than \$50,000 in 2009



Percent of Number of Foundations

Note: Based on 1,455 grantmaking Georgia foundations. Actual number per category shown in parentheses. Due to rounding, percentages may not total 100.

Top 10 Georgia Foundations by Total Giving, 2009

Foundation	Type ¹	Total Giving ² 2009	Total Giving ² 2008	Change (\$)	Change (%)	Previous Top 10 Rank
1. The Community Foundation for Greater Atlanta	CM	\$142,126,513	\$96,121,637	\$46,004,876	47.9	2
2. Robert W. Woodruff Foundation	IN	106,387,538	116,867,936	-10,480,398	-9.0	1
3. Marcus Foundation	IN	50,364,670	51,320,037	-955,367	-1.9	3
4. Coca-Cola Foundation	CS	40,968,382	36,743,015	4,225,367	11.5	5
5. UPS Foundation	CS	38,913,155	41,826,486	-2,913,331	-7.0	4
6. J. Bulow Campbell Foundation	IN	24,670,568	29,394,715	-4,724,147	-16.1	6
7. Goizueta Foundation	IN	22,968,538	5,868,407	17,100,131	291.4	-
8. Charles Edwin Suber Foundation ³	IN	12,902,529	n/a	n/a	n/a	-
9. Zeist Foundation	IN	10,382,642	7,810,300	2,572,342	32.9	-
10. Bradley-Turner Foundation	IN	9,902,145	12,051,720	-2,149,575	-17.8	7

Rankings exclude grantmaking public charities. The O. Wayne Rollins Foundation was omitted from the list because updated fiscal information was not available.

¹IN = Independent Foundation; CM = Community Foundation; CS = Corporate Foundation.

²Includes grants, scholarships, and employee matching gifts; excludes set-asides, loans, PRIs, and program expenses.

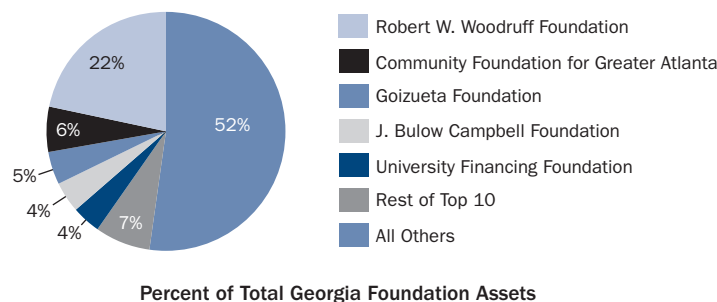
³New in 2009.

TRENDS IN TOP 10 FOUNDATIONS BY GIVING AND ASSETS

The Community Foundation for Greater Atlanta topped the list of Georgia foundations by total giving for 2009 with \$142 million in grants awarded, a record for the foundation (see bottom, page 3). The Goizueta Foundation reappeared on the list following a major strategic planning initiative that resulted in reduced giving in 2008. The Charles Edwin

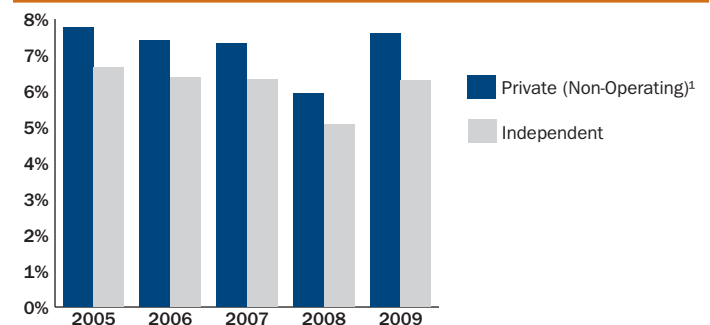
Suber Foundation, established in 2009 from the estate of a former Fulton County court clerk and Emory alumnus, debuted on the list after awarding several large grants to Georgia colleges and universities. These included gifts of \$4.25 million to Emory University's Candler School of Theology and \$3.35 million to Oxford College.

Ten largest foundations by assets held nearly half of total assets for all Georgia foundations in 2009



Note: Based on 1,455 grantmaking Georgia foundations. Due to rounding, percentages may not total 100.

Georgia Foundation Giving as a Share of Prior Year's Assets, 2005-2009



Note: Based on annual figures for total giving and total assets of Georgia foundations.
¹Includes independent and corporate foundations.

Top 10 Georgia Foundations by Assets, 2009

Foundation	Type ¹	Total Assets 2009	Total Assets 2008	Change (\$)	Change (%)	Previous Top 10 Rank ²
1. Robert W. Woodruff Foundation	IN	\$2,403,030,271	\$2,013,371,188	\$389,659,083	19.4	1
2. The Community Foundation for Greater Atlanta	CM	650,639,650	623,078,050	27,561,600	4.4	2
3. Goizueta Foundation	IN	481,490,041	395,680,183	85,809,858	21.7	4
4. J. Bulow Campbell Foundation	IN	475,099,921	434,475,062	40,624,859	9.4	3
5. University Financing Foundation	OP	424,822,191	384,294,168	40,528,023	10.5	5
6. Zeist Foundation	IN	218,491,373	192,192,244	26,299,129	13.7	-
7. Callaway Foundation	IN	177,955,549	189,417,098	-11,461,549	-6.1	6
8. Wilbur and Hilda Glenn Family Foundation	IN	144,876,631	157,420,834	-12,544,203	-8.0	8
9. Marcus Foundation	IN	137,986,196	170,034,465	-32,048,269	-18.8	7
10. Anverse	OP	128,883,007	151,069,764	-22,186,757	-14.7	9

Rankings exclude grantmaking public charities. The O. Wayne Rollins Foundation was omitted from the list because updated fiscal information was not available.

¹IN = Independent Foundation; CM = Community Foundation; OP = Operating Foundation.

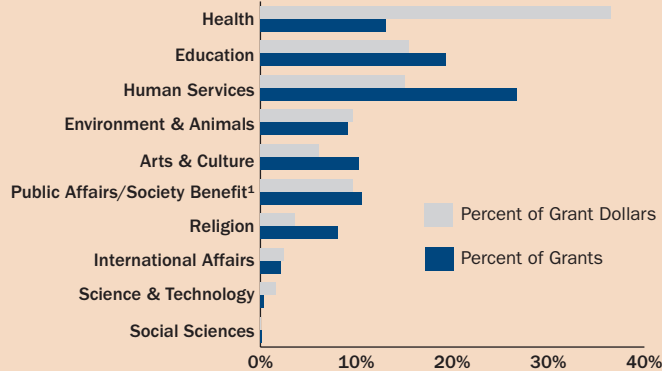
²The Zeist Foundation was omitted from the 2008 list because updated fiscal information was not available.

SELECTED GIVING PATTERNS, 2009

Health, education, and human services once again topped the list of priorities for Georgia foundations. These three fields accounted for more than 67 percent of all grant dollars and 59 percent of the number of grants awarded by Georgia foundations in the Foundation Center's 2009 grants sample. Arts and culture experienced the largest

decline in its share of funding, decreasing from 10.7 percent of grant dollars awarded in 2008 to 6.1 percent in 2009. Georgia foundations continued to award the largest share of grant dollars to capital projects over all other types of support, while the largest number of grants were awarded for general/operating support.

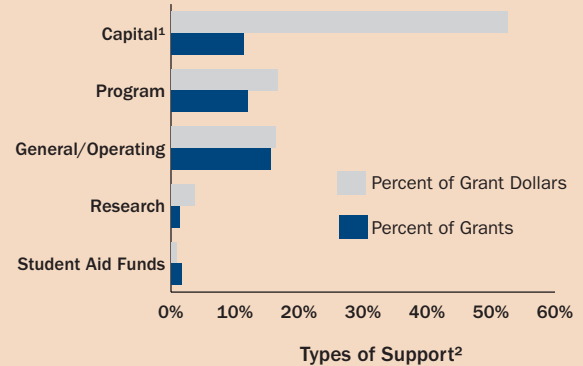
Georgia foundations gave most to health, education, and human services in 2009



Note: Based on grants of \$10,000 or more awarded by a sample of 27 larger Georgia foundations.

¹Includes civil rights and social action, community improvement and development, philanthropy and voluntarism, and public affairs.

Georgia foundations provided their largest share of giving for capital support in 2009



Note: Based on grants of \$10,000 or more awarded by a sample of 27 larger Georgia foundations.

¹Capital support includes endowment funds.

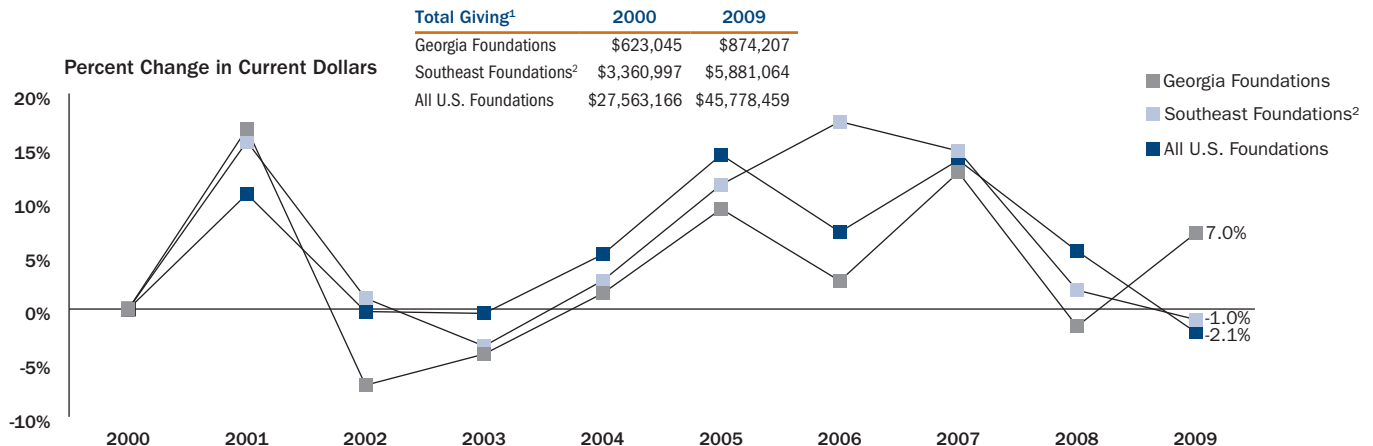
²Approximately 36 percent of grant dollars and 64 percent of grants could not be coded for a type of support due to a lack of sufficient descriptive information.

GOOD STEWARDSHIP LEADS TO INCREASED GIVING

While foundation funding nationally declined 2.1 percent between 2008 and 2009, giving by Georgia foundations increased 7 percent. This surge in giving was due in large part to a \$46 million increase in grants awarded by the Community Foundation for Greater Atlanta. The foundation attributed this growth to increased gifts and a strong investment strategy,

noting in its 2009 annual report that a blend of strategic asset allocation, long-term focus, and diversification resulted in \$30 million in increased assets. Strategic investment will remain critical for foundations as financial markets continue to fluctuate following the economic crisis.

Year-to-Year Change in Foundation Giving Since 2000



Source: Foundation Center, 2011.

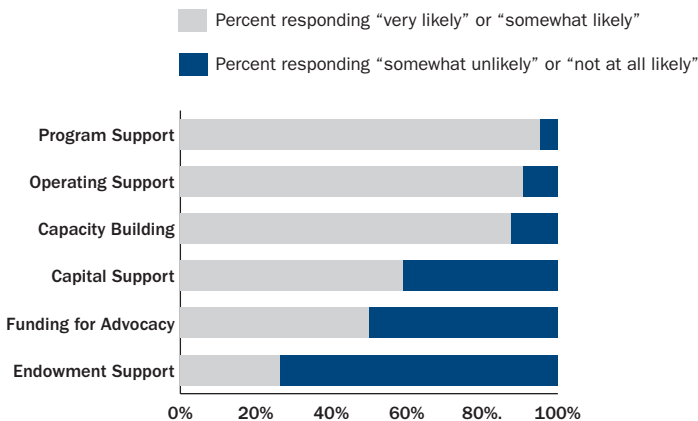
¹Dollar figures in thousands.

²Includes data for Virginia, North Carolina, South Carolina, Georgia, Florida, Alabama, Mississippi, Louisiana, Arkansas, Tennessee, and Kentucky.

PROJECTED GIVING, 2010 AND BEYOND

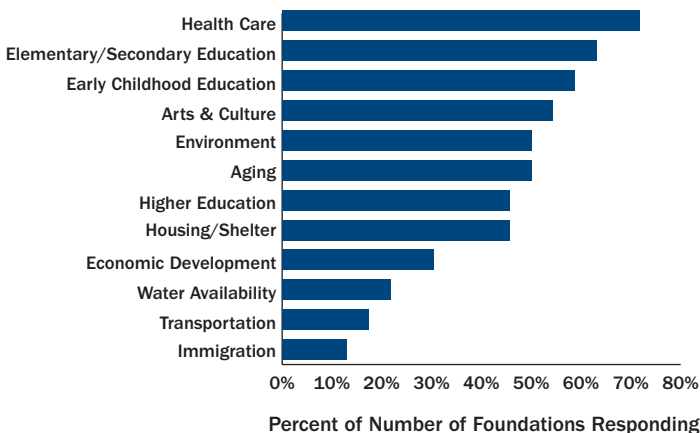
In July 2011, the Foundation Center conducted a survey of Georgia funders in partnership with the Georgia Grantmakers Alliance. Respondents included 46 Georgia-based grantmakers accounting for nearly 60 percent of all Georgia foundation assets. Looking ahead, 27 percent of responding grantmakers expect their 2011 giving to increase, 67 percent said their giving would remain the same, and only 6 percent projected a decline in giving. Respondents identified operating support and capacity building as two priorities for future giving, while fewer felt the need for endowment or advocacy funding. Health care and education led the areas of interest in which respondents expect to provide future funding.

How likely is your foundation to provide the following kinds of support to your grantees over the next five years?



Note: Based on responses to a July 2011 survey of Georgia Grantmakers Alliance member organizations. A total of 46 Georgia grantmakers responded to this question.

In which of the following issues is your foundation likely to invest grant money over the next five years?



Note: Based on responses to a July 2011 survey of Georgia Grantmakers Alliance member organizations. A total of 46 Georgia grantmakers responded to this question.

GRANTMAKER PERSPECTIVE

In light of the recent economic crisis, what advice would you give to grantseekers for building effective relationships with funders?

- ◆ It is important for an organization to demonstrate that it is being strategic in understanding what opportunities (not just challenges) might be found in the economic crisis. Strategic planning that involves staff, board, and key stakeholders is essential to garnering the interest and attention of funders.
- ◆ The crisis has provided an excellent time for organizations to reassess the mission alignment of their programs and strategies and to potentially close down programs and activities that do not align or fail to reflect their core competencies and centers of excellence. The crisis has also provided a unique opportunity for organizations to discuss “sacred cows” or other typically untouchable subjects, especially at the board level.
- ◆ Organizations should be prepared to quantify and document the outcomes that they achieve. Resources are limited, and funders want to know that they are investing in success. Cost/benefit analysis is also important; funders want to invest in organizations and programs that deliver the most benefit for dollars spent.
- ◆ Where new program initiatives might be appropriate (and financially sustainable), they should be built upon an existing organizational infrastructure. Also, organizations that operate on marginal budgets, or find themselves increasingly with year-end deficits, should seek opportunities to merge or collaborate with others in the field.
- ◆ Finally, leverage is key. Communicate to donors how their support can help open doors to other funding opportunities.

—Barbara (Bobbi) Cleveland, Executive Director, The Tull Charitable Foundation



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ALLIANCE



Southeastern Council
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in partnership with the
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Download Key Facts on Georgia Foundations at foundationcenter.org/gainknowledge.

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