

# Your Philanthropy Experience

## Introduction – The First Meeting

- ◆ Why partner with the Community Foundation of Broward?
- ◆ Our leadership on community solutions using the collective impact model.
- ◆ Find out how we connect people who care with causes that matter.

## Values 360° Experience

- ◆ Facilitated discussion about your values and interests – your life stories.
- ◆ Development of your Philanthropic Mission Statement.
- ◆ Documentation of your values, interests and mission to chart your philanthropic journey.

## Philanthropy Planning

- ◆ Create your philanthropy plan based on your Values 360° experience.
- ◆ Structure your philanthropy plan so that it is strategic and reflects who you are.

## Sign the Fund Purpose Agreement

- ◆ Name your Fund – create your legacy.
- ◆ Define the purpose of your Fund – reflective of your values and interests.
- ◆ Structure your Fund – make the impact you envision.

## Welcome & Orientation

- ◆ Introduction to your Community Foundation team – your expert philanthropic counsel.
- ◆ Community updates: annual report, newsletters and special community reports.
- ◆ Experience the joy of giving, knowing we handle administrative detail.
- ◆ Compliance with the ever-changing IRS regulations and best practices.
- ◆ Access to our sophisticated investment portfolio with world-class oversight.

## Community Builder Planning

(for endowed Funds seeded with a minimum of \$1 million)

- ◆ Memorialize your legacy on our beautiful donor wall.
- ◆ Celebrate your philanthropy at a private reception.
- ◆ Inspire others with a Community Builder announcement card.

## Grantmaking – Based on Your Philanthropy Plan

- ◆ Due diligence of nonprofit programs.
- ◆ Error-free and timely processing of grants.
- ◆ Know you are making an impact through reports and success stories.
- ◆ Comprehensive quarterly statements of all Fund activities.

## Educational Opportunities and Special Invitations

- ◆ Learn about causes and organizations through organized site visits.
- ◆ Join like-minded people at Food for Thought – fun and educational events.
- ◆ Attend our annual Legacy Society luncheon to celebrate forward-thinking philanthropists.

## Annual Evaluation of Your Philanthropy Experience

- ◆ Is your philanthropy joyful and fun?
- ◆ Do you feel connected, know that you are making a difference and have peace of mind?



- ◆ 450 charitable Funds
- ◆ \$173 million in assets
- ◆ 30 years of experience
- ◆ \$72 million in community grants
- ◆ Ranked in top 100 community foundations