

THE POWER OF CONNECTION



OUR MISSION Inspiring charitable giving, building resources for the future and connecting donors who care with causes that matter OUR VISION A community fully engaged in meeting needs now and into the future OUR VALUES Cobb Community Foundation is committed to achieving our mission and vision by upholding and promoting the following guiding principles: • STEWARD WITH INTEGRITY – We are entrusted with financial resources and charitable wishes of

- our donors and fundholders, and hold ourselves accountable to be ethical, honest, and transparent in our actions.
- **COMMIT TO EXCELLENCE** We strive to provide the highest quality and value in everything we do.
- **LEAD WITH COMPASSION** We take action because we care deeply for our community and those we serve.
- **GIVE WITH PURPOSE** We leverage data to enhance our understanding of the needs of our community and mobilize resources to meet those needs.
- **EMBRACE DIVERSITY** We embrace diversity, stand for equity, and encourage inclusion through our practices and daily interactions within our organization, community, and partnerships.
- FOSTER COLLABORATION We work collaboratively with community stakeholders, empower others to build lasting partnerships, and embrace our shared responsibility to work toward productive solutions to strengthen our community.
- ADAPT TO CHANGE We are committed to evolve and grow to serve the changing needs of our community.



LETTER OF GRATITUDE



Dear Friends,

How do you describe Cobb Community Foundation in one word? If you're like most people, your answer is "connector." Frankly, we couldn't be happier, because that is exactly what we want to be.

We connect nonprofits to nonprofits. In fact, in 2022, we brought together nearly 30 organizations at a single gathering to discuss with peers what services they were providing when and in which areas. These organizations together identified their own and one another's gaps so that those gaps could be filled. They also identified where their services overlapped and adjusted accordingly. The result? More needs were met without the creation of new organizations or a need for additional resources. The existing organizations, programs and resources were simply deployed differently. That is the power of connection.

Resources are not always sufficient. One of our greatest honors is connecting individuals, families and organizations with nonprofits that are having an impact. When they bring their capital to bear, whether that capital is financial, intellectual, social or otherwise, these individuals, families and organizations are making a difference that would not have been made without them. That is the power of connection.

There are also many who are connectors for us. We appreciate the many professional advisors who introduce us to their charitably-minded clients who, currently or in the future, want to include support of their local community as part of their overall giving strategy. Likewise, our treasured fundholders are amazing connectors themselves, sharing with friends, family and beyond how Cobb Community Foundation is helping them to create their legacy. They understand the power of connection.

To our community, thank you for allowing us the privilege of being your connector.



Kim Gresh Chair S.A. White Oil Company



Shari Martin

Shari Martin
President & CEO

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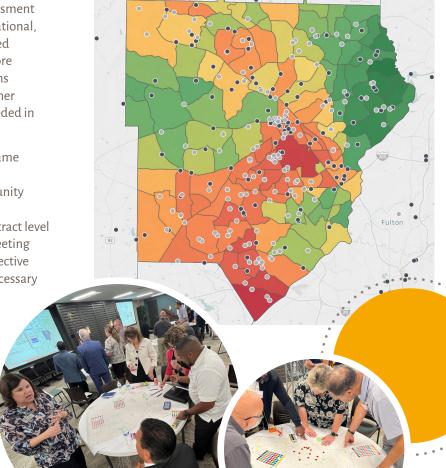
CONNECTION COLLABORATION

In 2022, with the pandemic behind us, we revisited the key recommendations from our 2019 Human Resources Assessment of Cobb County, one being to make available multi-generational, wrap-around services in local communities through trusted providers. This did not mean more brick and mortar or more nonprofits. What it did mean was identifying organizations who were willing to make unutilized space available to other organizations to provide additional services that were needed in that community.

In June, representatives from 29 different organizations came together to obtain information and make the connections necessary to transition a standalone facility into a "community resource center". Tommy Pearce, Executive Director of Neighborhood Nexus, presented the most recent census-tract level data for this area, and through a facilitated discussion, meeting participants shared their thoughts and plans with the objective of collectively ensuring that gaps are filled and unnecessary







PARTICIPATING ORGANIZATIONS

Austell Community Task Force

Cobb Collaborative

Cobb County Government

Cobb County Sheriff's Foundation

Cobb Douglas Public Health

Cobb Senior Services

Community Foundation for Greater

Atlanta

Cumberland Community Church

Family Life Restoration Center

First Christian Church of Mableton

Good Samaritan of Cobb

Green Acres Baptist Church

HOPE Family Resource Center

Mableton Improvement Coalition

Mission 1:27

MUST

Neighborhood Nexus

Noonday Association

Powder Springs Community Task Force

Reflections of Trinity

Ser Familia

South Cobb Redevelopment Authority

Sweetwater Mission

Tillman House

United Way Metro Atlanta NW Region

Wellstar

Wellstar Foundation

WorkSource Cobb

YMCA



LITTLE SCHOOL AT GREEN ACRES

The Church at Green Acres exemplifies the concept of a community resource center. Pastor Iuveni Guitierez opens up the church weekly for the McCleskey-East Cobb Family YMCA to distribute food and, with a grant provided by Cobb Community Foundation, also provides the space for the Y to offer "Little School," a program that helps four- and five-year-olds get ready for kindergarten.

On the first day of Little School Camp, the teachers reported that little Sofia came in crying because she didn't want to be away from mom or with strangers. That day, the class worked on spelling their names. Sofia could not spell her name and she was shy about participating. But by the end of the four weeks, Sofia was making friends, coming into class with a smile, and she now could spell her name with pride.

We are grateful to the YMCA for their role in bringing this program to children at The Church at Green Acres. This is another reason why we do what we do. Investing in the education of the littlest members of our community is just one way we are helping our community to thrive.

"This is a great start toward being successful in kindergarten. Thank you, Cobb Community Foundation, for your donation that is making a difference in the lives of the families we serve."

> – Gayle Battersby, McCleskey-East Cobb Family YMCA



Census Tracts (2010)
Colo

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The assessment identified a number of challenges facing our community, one being that in some areas of Cobb, as few as 8.3% of our third graders are reading on or above level. Research has shown that one of the strongest indicators of third grade reading level is kindergarten readiness.





In some areas of Cobb, as few as 8.3% of our third graders are reading on or above level.



FILLING THE GAP

CIRCLES COBB

Another recommendation of the needs assessment was to identify and fill gaps in services. CCF observed that there are numerous programs with missions to help youth build the foundation needed to excel as adults. Likewise, there are many organizations focused on helping adults to become financially stable. What was missing, however, was a program designed to help adults not just survive, but to thrive.

In 2021, CCF learned about Circles USA and that two community leaders, Jeff Jernigan, President of Marietta-based Pinkerton & Laws, and Roger Vest, then pastor of Powder Springs First United Methodist Church, had begun conversations about starting a chapter in Cobb County. CCF joined the team to move the initiative forward.

Circles USA gathers middle-income and high-income volunteers to support families in poverty. Surrounded by people who have landed jobs, negotiated a lease, or managed credit card debt, for example, people experiencing poverty are more equipped to achieve long-term financial stability. This program is not a band aid approach, but a proven model with measurable data.



On average, participants achieve a 39% increase in income after 6 months in the program and a 78% increase after 18 months.



In 2022, a core group of faith-based organizations and business leaders came together to begin the work of building the program here in Cobb County. The first leadership planning meeting took place in January, and Holly Tuchman, co-owner of Robert Kent Gallery and former CEO of LiveSafe Resources, and Jeri Barr, retired CEO of Center for Family Resources, were soon recruited to lead the board of directors for the newly created Circles Cobb. Over the course of the year, the foundation was laid and in November, Barbara Garner was hired as the new executive director. Under her leadership, the program is beginning the work of impacting Cobb families working to end the cycle of poverty.





BUILDING CAPACITY



JUMPSTART NETWORK FOR GOOD GRANTS

Another recommendation of the needs assessment was to help small to mid-sized organizations serving areas with the highest levels of need to build their capacity. With funding provided by Corporate Community Champion Liberty Furniture and the United Way of Greater Atlanta NW Region, CCF awarded five Network for Good Jumpstart capacity-building grants of \$5,000 each to H.O.P.E. Family Resource Center, The Sobriety Resource, Connecting Generations, Self-Discovery Pain, Positioning and Purpose, and Circles Cobb to fund a 2023 cohort. In its second year, the Jumpstart grant program partnership will provide a robust, 12-month training program to build fundraising capacity, diversify revenue, and grow and sustain programs for this group of nonprofits.







Awarded Five Network for Good Jumpstart capacity-building grants of \$5,000 each











"We were excited to hear so many good things from the 2022 Jumpstart participants about how their participation has helped them to develop new strategies and scale their efforts to create a bigger impact. We know how important it is for help to be available where it is most needed, so we are going to continue do what we can to help build capacity in organizations operating in those locales."

Shari Martin, CCF CEO.

To ensure readiness, leadership of the first four recipient organizations participated in a six-month training program offered in 2022 through the Georgia Center for Nonprofits (GCN), paving the way for their participation in the Jumpstart program in 2023. The newly established Circles Cobb was identified as the fifth and final organization to join the cohort.

> CCF CEO Shari Martin and **Connecting Generations** Director Arlene Williams

H.O.P.E. Family Resource Center Director Carolyn Turner and CCF CEO Shari Martin











CCF CEO Shari Martin and Self Discovery: Pain, Positioning & Purpose Executive Director Vanessa Abrams

The Sobriety Resource Director Charmon Talley and CCF CEO Shari Martin

CCF CEO Shari Martin and Circles Cobb Executive Director Barbara Garner

2022 CORPORATE COMMUNITY CHAMPIONS

CORPORATE COMMUNITY CHAMPION PROGRAM

The Corporate Champion program is designed for corporations and local businesses that believe that good corporate citizenship involves supporting charitable endeavors that are impacting the community. These organizations appreciate CCF's depth of knowledge of both the community's needs as well as the organizations serving those needs. Champions enjoy the simplicity of being a part of a larger pool that can collectively make a greater impact than any single company can make alone.

Through funding provided by Corporate Community Champions and other donors, Cobb Community Foundation awarded 14 CCF 2022 Thrive Grants to deserving organizations making an impact in key areas of need in the county.

2022 CORPORATE COMMUNITY CHAMPIONS

DIAMOND







PLATINUM











GOLD







SIGNATUREFD

SILVER













BRONZE

Ameris Bank : Atlanta Country Club : Cumberland Diamond Exchange : Mopdog Creative + Strategy : Smith + Howard : Synovus

PARTNER

Barnes Law Group dk Gallery Fortress Builders (W&H Investments) Marietta Country Club Mauldin & Jenkins, LLC

Paraklete Financial Renasant Bank ServIT The Bottoms Group

CHAMPION ROUNDTABLE





CORPORATE CHAMPION ROUNDTABLE MEETINGS

Begun in 2021, our Corporate Champion Roundtable meetings were established to bring together an elite group of business leaders who have the ability to direct resources to powerfully impact areas of need in our community. At the beginning of 2022, participants developed a map identifying where and how charitable needs are currently being supported through corporate donations. Once the charitable areas were identified, the group began to explore where the gaps existed. Together we learned the greatest areas of need not currently receiving enough attention are childcare, transportation, legal services, and affordable housing. After some initial research, it was determined that childcare, a factor that impacts employment on all levels, was a topic of interest for further exploration by the group in the coming year.

Corporate Champions Roundtable Participants

Atlanta Braves Gas South
Atlanta Country Club Genuine Parts Company
Bennett Thrasher Georgia Power
Brasfield & Gorrie Indian Hills Country Club

Brasfield & Gorrie Indian Hills Country Club
Crane Elder Law Firm Liberty Furniture

Cumberland Diamond MetroAtlanta Ambulance Service

Moore Colson Mopdog Creative + Strategy Pinkerton & Laws

Pinnacle Financial S.A. White Oil Company, Inc.

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SignatureFD

Smith & Howard

Synovus

Walton Communities
Wellstar Health System









2022 CCF THRIVE GRANTS

In 2022, CCF used very intentional strategies to create the Thrive Grant program to strengthen and support small to mid-sized nonprofit charitable organizations located in the hot zones identified in the original needs assessment. In the inaugural year of the grant program, the goal was to create a program where the process itself was helpful to all the organizations completing the application, even if they did not receive a grant.

An authority in the field of grant writing for nonprofits, Karin Douglas of The Intermission Group was hired to help create a new process. This robust application was designed to better prepare nonprofit teams to complete future grant requests through strategic question blocks. Additionally, Douglas facilitated three separate information sessions meeting agency representatives in person to walk through the comprehensive grant application. The award was designed not to provide more than 10% of an organization's income. Organizations with total revenues between \$75,000 and \$1,000,000 were eligible to apply. The selection process that ultimately determined which agencies would receive grants was organized to identify teams who showed a willingness to self-assess, to partner with others, and to work toward a compelling vision for how they would help our community thrive along with:

- a demonstrated orientation towards best practices in nonprofit leadership, board engagement, and resource development,
- a well-articulated need for services and a clear path to impact in Cobb County,
- a recognition of the value of collaboration and resource leveraging,
- a diverse revenue stream and financial stability, and
- a self-awareness with respect to challenges and opportunities.

At the end of the process, all organizations that applied were featured on CCF's website to make it easy for readers to make contributions.







In total, CCF awarded \$105,000 in Thrive Grants to 14 outstanding nonprofits. As with all the organization's grant programs, the Thrive Grants are funded entirely through contributions to Cobb Community Foundation. CCF's Corporate Community Champions and other donors, through direct contributions, bequests, Qualified Charitable Distributions from IRAs and more, maximize the impact of their charitable dollars by leveraging CCF's expertise and knowledge of the community.

























Made possible by Brasfield & Gorrie and other donors

Four Corners Group – \$7,500 Sweetwater Mission – \$7,500

Made possible by Genuine Parts and other donors

Teach One to Lead One - \$7,500 Y.E.L.L.S. - \$7,500

Made possible by Metro Atlanta Ambulance and other donors

Cumberland Counseling Center – \$7,500 Loving Arms Cancer Outreach – \$7,500

Made possible by Crane Elder Law Firm and other donors

Marietta Mentoring for Leadership - \$7,500

Made possible by Moore Colson and other donors Food Security for America – \$7,500

Made possible by Pinnacle Financial and other donors

Wonderful Days Preschool - \$7,500

Made possible by SignatureFD and other donors Lekotek of Georgia – \$7,500

Made possible by our *Silver Corporate Community Champions

Communities in Schools of Georgia in Marietta/ Cobb County – \$7,500 Special Needs Cobb – \$7,500

Made possible by our **Bronze and ***Partner Corporate Community Champions

Paint Love - \$7,500 Revved Up Kids - \$7,500

^{*}Silver Level Champions include Bennett Thrasher, Cobb EMC, Gas South, Georgia Power Foundation, Indian Hills Country Club, and Pinkerton & Laws.

^{**}Bronze Level Champions include Ameris Bank, Atlanta Country Club, Cumberland Diamond Exchange, Mopdog Creative + Strategy, and Synovus.

^{***}Partner Champions are Barnes Law Group, dkGallery, Fortress Builders, Marietta Country Club, Mauldin & Jenkins, Paraklete Financial, Renasant Bank, ServIT, and The Bottoms Group.

THRIVE GRANT WINNERS



Communities in Schools:

Natalie Rutledge, Executive Director | The mission of Communities In Schools of Georgia in Marietta/Cobb County is to surround students with a community of support, empowering them to stay in school and achieve in life.



Cumberland Counseling Center:

Alexandra Thompson, Director & Katherine Kessler, Therapist | Cumberland Counseling Centers house clinical counseling centers inside the walls of churches and cares for the with mental health of the community by providing quality and accessible mental health services for all people.



Food Security for America:

Nancy Yarnell, Director | FSA creates food security communities across America to equip those in need of healthy food through education and fellowship.



Four Corners Group:

Four Corners Group decreases juvenile recidivism and works to end the school-toprison pipeline by providing youth with education, support, and empowerment to realize their full potential and live successful lives.



Lekotek of Georgia:

Helene Prokesch, Executive Director | Lekotek facilitates the inclusion of children with disabilities into their families, schools and communities by providing accessible play, adapted toys, technology, information and resources.



Loving Arms Cancer Outreach:

Janet Graham, Executive Director | Loving Arms instills hope and joy, by providing emotional, financial and resource support to empower patients and their families to navigate the multiple challenges they face in their cancer fight.



Marietta Mentoring for Leadership:

Kristen Thompson, Executive Director | Marietta Mentoring for Leadership provides high-potential, under-resourced youth with community mentors and provides collegial experiences that encourage and support students to maximize their leadership and their personal, academic, and future success.

















Paint Love:

Laura Shaw, Executive Director | Paint Love provides extraordinary arts programming to youth facing poverty and trauma.

Revved Up Kids:

Celia Talbot, Board Member | Revved Up Kids protects children and teens from sexual abuse, exploitation and trafficking by providing exceptional prevention training programs for children, teens, parents and youth-serving organizations.

Special Needs Cobb:

Debbie Day, CEO | Special Needs Cobb transforms the lives of individuals with special needs through group housing, respite care, caregiver life-planning workshops, and resources for parents.

Sweetwater Mission:

Pat Sodden, Executive Director & Debbie Ginocchio, Director | Sweetwater Mission stabilizes families by preventing hunger and homelessness and transforming lives through education and employment opportunities since 1968.

Teach One to Lead One:

Robert Pledger, Area Manager | Teach One to Lead One is a community mentoring program that teaches at-risk kids to lead a life of purpose and potential by applying these universal principles: self-control, respect, integrity, courage, humility, excellence, compassion, enthusiasm, teamwork and honor.

Wonderful Days Preschool:

Martha Tovar, Preschool Director | Wonderful Days Preschool transforms the lives of low-income families by providing preschool children with the early educational skills needed to succeed in kindergarten and beyond.

YELLS:

Laura Keefe, Director | YELLS empowers youth to rise as active, healthy, and productive servant-leaders who uplift their community. We envision communities where youth have voice and value and ensure they possess the leadership skills, confidence, character, and collaborative networks needed to shape their world.



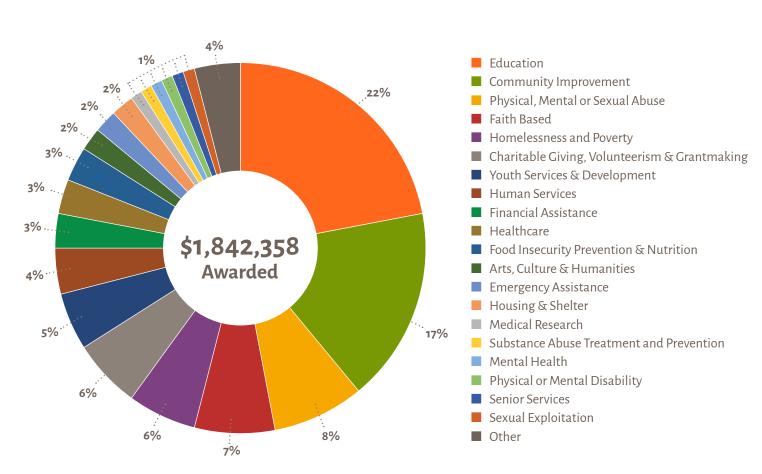
CONNECTING DONORS WHO CARE WITH CAUSES THAT MATTER

In total, our Corporate Champions and other donors enabled Cobb Community Foundation to award \$236,050 in community grants to organizations serving Cobb County. That's only a small portion of our grantmaking, however. Nearly 200 charitable funds have been established with CCF by individuals, families, companies and organizations. In some cases, funds were established for a specific organization or to help address a specific cause or with a specific purpose in mind. In many others, though, charitable funds were created with us because the funders knew we could help them to better understand their communities' needs, the organizations helping to address those needs, and put them on a path to making a difference.

Through conversations, presentations, backyard soirees, and our favorite, bus tours, we have helped our fundholders and guests to "expand their bubbles" and learn more about our community, what it has to offer, and what they can offer to it. Through both individual and corporate donor advised funds, scholarship funds, employee assistance funds, and designated and field of interest funds, our fundholders gave over \$1.6 million charitably, and we are both honored and humbled to have had a role in their impact.

Combined, the total awarded in 2022 was \$1,843,358. Since we became our own 501(c)(3) in 2005, with our fundholders, we have made charitable distributions of over \$16 million, the vast majority of which have been to organizations serving Cobb County.

2022 Charitable Dollars Awarded



BUS TOURS





NONPROFITS MAKING A DIFFERENCE BUS TOURS

Our Nonprofits Making a Difference Bus Tours are our most tactile approach to introducing CCF Fundholders to outstanding nonprofits meeting needs in our community. These bus tours give riders a chance to connect with others to share an experience learning about organizations on a deeper level. When our riders get on the bus, they get to see exactly where these organizations are located and the people who have devoted themselves to these important causes. They get to hear from the staff themselves and they get to feel all the feelings that emerge from the stories that are chared. The time spent onsite

that emerge from the stories that are shared. The time spent onsite is inspiring, to say the

least. This is a big part of our mission and those connections have created impact through new

opportunities and partnerships.



Throughout 2022, we introduced fundholders and friends to the teams at 26 different nonprofit agencies up close and personal. We heard a common response frequently from those experiencing the bus tour for the first time — "I didn't know we had these kinds of needs in Cobb County."

Or, "I have driven by this building so many times and never knew what amazing things were being provided to our community here."

DUARTETO NUE

by this building so many times and never knew what amazing things were being provided to our community here."

DONOR ADVISED FUNDS

Donor advised funds provide the donor maximum flexibility, allowing charitable donations to be made when it makes the most sense for the donor without requiring him/her to select the ultimate charitable recipients until ready to do so. Individuals and families often establish these "Giving Funds" to teach younger generations about giving, to set funds aside during high income years to give away in lower income years, or even to simplify the administrative aspects of giving. Donor advised funds operate similarly to a personal or family foundation but without the complexity and expense.

New Donor Advised Funds Opened in 2022

- Fondo de la Familia Buyers
- Alday Giving Fund
- raised By angels Fund
- Angela & Nick Massengill Family Fund

- Hungerford Family Fund
- Oliver Family Fund
- Four Anonymous Funds

SHARING THE GIFT OF LITERACY

Sharing the gift of literacy with kids in our community is the focus for new fundholder, John Alday. With a love for education, and especially spending time with a good book himself, John understands the power of literacy as a foundation for school success. John credits both his parents, but particularly his father for instilling his love of learning and reading. Though not an educator by trade, his father had a natural, easy gift for training and instructing others in various roles in his lifetime. "He was very spiritual. He cared deeply and was deeply cared for by those who knew him," says John. That care also extended to his community and laid the foundation that has now been passed to the next generation.



After spending time caring for his father before he passed away, John began to think more about how he could give back to his community. He learned about Cobb Community Foundation (CCF) through his CPA, Tammy Guelfo, at HLB Gross Collins. A member of CCF's Professional Advisors Network, Tammy was able to share the benefits of partnering with CCF not only from a tax standpoint, but from a value perspective as well. CCF is an especially good fit for the donor who cares about making a difference in and around the Cobb community. CCF provides oversight and nonprofit vetting, and makes giving easy by providing nonprofit recommendations matching donors' charitable interests. As with all donor advised funds, donors receive a charitable deduction when making the contribution to their fund, allowing them the opportunity to distribute gifts to charitable organizations over time.

Connecting donors who care with causes that matter is an important part of our mission, and we take that role seriously by being an active part of the nonprofit community and by using the most current insights available. Our various charitable fund options allow fundholders to be strategic, purposeful, and impactful while simplifying the giving process at the same time. For all these reasons, we can help donors like John make their greatest impact through a fund at Cobb Community Foundation.

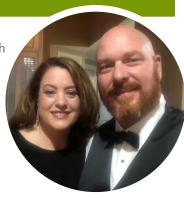




The Burckhalter Fund

Amber and Jarrette Burckhalter are committed to giving back. Successful business owners, they are active, involved members of the Cobb community who are passionate about their volunteer and church involvement. When they sold one of their businesses in 2021, they wanted to devote a portion of the sale to their work in the community. CPA Brett McClung suggested they contact CCF about creating a donor advised fund before the end of the year, so they could secure their charitable tax deduction when they needed it most.

There are a lot of time-consuming activities that take place around selling a business. But it only took 10 minutes to set up their donor advised fund on the CCF website. "We didn't even know this existed," Jarrette recalled. "Giving our time, treasure and talents is central to who we are, and so we decided this check would be the first one we would write."



The Burckhalters shared that they had always made a point to give but never had a plan for giving. "One of the advantages of creating this fund was the additional planning time it gave us." Over the years, the family has supported many different kinds of charities, but working with CCF allows them to see the big picture of nonprofit work in our community and to be more intentional with their support.

Jarrette is particularly excited to be making gifts in the kind of meaningful way he says they have not been able to do before. "That's what was so beneficial about creating a fund through CCF. It's exciting to be able to give with impact," said Jarrette.

Bonstein Family Fund

"Building community in every way possible" is the heart and soul of Bob and Linda Bonstein's donor advised fund. Married 48 years, Bob and Linda Bonstein are now retired from their careers in Healthcare Management Consulting and Education/Employee Benefits respectively. In between family road trips, performing with the Georgia Symphony Orchestra Chorus and their bicycling hobby, they have made giving back to the community an important part of their retirement plans.

The Bonsteins have many reasons for giving, but they point to their faith as their foundation and their church as another area of service. They share the importance of generosity with their family and talk enthusiastically of increased giving impact, and they have asked for donations in lieu of birthday and holiday gifts.

When it comes to building community, Bob and Linda have many interests, but believe the place to start is connecting with organizations doing this locally. Working in Board leadership with organizations like the Georgia Symphony Orchestra, The YMCA, Big Brothers Big Sisters, and Family Promise has given them a well-rounded perspective on what it takes to help impoverished families to regain their dignity and their connection to community.



"There's such a divisive environment of political and social unrest that we are all experiencing right now. We want to do whatever we can to make meaningful contributions that will help make things better in our community," Bob says.

A DONOR LEGACY

Bob Neisler, A Legacy Well Lived - Robert Neisler

On September 19th, we received word that one of our fundholders, Robert Neisler, had passed away. Mr. Neisler was originally a client of Morris Henderson, founding partner of The Keystone Financial Alliance. It is not uncommon for fundholders who were referred to CCF by a financial advisor to communicate their wishes through that advisor, as was the case for Robert Neisler. As a result, our team never had the opportunity to get to know him personally.

What was very clear, however, was that Robert Neisler stewarded his resources well. His focus was on service to others, service to his family, to his customers and beyond. According to Morris Henderson, Mr. Neisler was particularly determined to make sure that the way in which, and the degree to which he served others was whatever would be most helpful and make the most sense for the beneficiary of his efforts.

For years, Mr. Neisler and Henderson had discussed the plans that would finally become a reality when the Brake-O Brake Centers that he owned were sold. The liquidity event created the opportunity to both simplify and maximize his charitable giving; the time was finally right for Mr. Neisler to create a donor advised fund. At the time, Henderson was serving as board chair of Cobb Community Foundation and had become intimately familiar with the benefits of having such a fund with a community foundation as opposed to another provider.

Mr. Neisler was fascinated with the fact that he could give appreciated stock charitably and that his deduction would be for its fair market value, irrespective of any imbedded gain. Every contribution made by Mr. Neisler to The Neisler Family Fund over the years was made with stock(s) specifically recommended and identified by The Keystone Financial Alliance as being most tax advantageous. With those contributions, The Neisler Family Fund supported local as well as national organizations that were providing services representative of his family's values.

CCF's donor advised fund agreements provide fundholders with a great deal of flexibility in specifying how any balances remaining in the fund should be managed when the fundholder is no longer able to do so. Successors can be named to advise CCF regarding future grants. Specific funds, organizations or causes can be named as fund beneficiaries. Likewise, the fundholder can simply allow CCF to determine how best to deploy the dollars locally based on the needs in the community at the time. Such was the case with The Neisler Family Fund.

Mr. Neisler's generosity did not end there, however, and neither did Henderson's advice. Financial advisors know that retirement assets are the most "expensive" assets for an individual to inherit. Depending on the size of the estate, retirement assets may be subject to estate tax, and under all circumstances, they will ultimately be subject to income tax. If a charity is beneficiary of retirement assets, however, the assets will be subject to neither estate taxes nor income taxes. Retirement assets are worth 100 cents on the dollar to a charity but as little as 45 cents on the dollar to an individual. Mr. Neisler named Cobb Community Foundation, a charitable organization, as beneficiary of his IRA.

As a result of Mr. Neisler's generosity, not only were significantly more grants awarded in 2022 than had been originally planned, more grants will also be awarded in the future wherever the dollars are most needed at the time. Mr. Neisler lived his legacy during his lifetime and ensured that his legacy would continue long after.

We are so very grateful to Robert Neisler for his generosity, to Morris Henderson and the team at The Keystone Financial Alliance for their excellent advice, and to Mr. Neisler's family for allowing us to share this story.

Mr. Neisler lived his legacy during his lifetime and ensured that his legacy would continue long after.





\$236,050 grants awarded from our community funds made possible by Corporate Community Champions, Robert Neisler & other donors.

CORPORATE DONOR ADVISED FUNDS



As companies look for new ways to engage their employees and make a positive difference in our communities, Corporate Donor Advised Funds (Corporate DAFs) are becoming an increasingly popular philanthropic strategy. Corporate DAFs provide companies with the ability to set aside charitable dollars in high-profit years, creating a resource to continue community support in the low-profit years. This innovative approach not only benefits those in need, but also provides a meaningful way for employees to get involved.

New Corporate Donor Advised Funds Opened in 2022

• Two Anonymous Funds

• The Charles Luckey Fund

EMPLOYEE ASSISTANCE FUNDS

Employee Assistance Funds (EAFs) are a tax-deductible, charitable solution typically established by employers to provide emergency assistance to employees experiencing specific types of hardship. EAFs remove the employer and its HR department from the process, providing a confidential avenue for the employee to receive assistance while preserving both dignity and privacy.

New Employee Assistance Funds Opened in 2022

• Three Anonymous Funds

• Atlanta Country Club EAF

The Story of the Charlie Luckey Funds

Charles Luckey was Atlanta Country Club's Assistant Caddy Master and later Caddy Master from 1967 – 2009. To honor his service, the ACC's Board of Directors created the Charlie Luckey Fund to identify deserving individuals among the club's employees, their children, and grandchildren whose potential to pursue higher education may be unfulfilled due to circumstances beyond their control. Since its inception in 2009, The Charlie Luckey Fund has experienced healthy growth, awarding \$575,000 in scholarships through proceeds from golf tournaments and fundraising campaigns.



With that success in mind, Club leadership came to CCF seeking assistance to create more resources to benefit their employees. Employee Assistance Funds are a tool that CCF offers to employers that allows them to help employees experiencing financial hardship through no fault of their own. Over the years, valued Club employees have faced difficult circumstances that led to financial hardships. Although club leadership desired to help, there was no charitable mechanism in place for employee assistance. This led to the creation of the Atlanta Country Club Employee Assistance Fund.

With the objective in mind to always have these funds available when needed, and to create maximum flexibility, ACC now has three charitable funds with Cobb Community Foundation.

- 1. The original Atlanta Country Club Charlie Luckey Fund (which continues to fund scholarships for ACC employees, their children and grandchildren)
- 2. The Atlanta Country Club Employee Assistance Fund
- 3. The Charles Luckey Fund

This approach has simplified the way that donors contribute, and funds go where they are needed the most. All contributions and fundraising proceeds go to The Charles Luckey Fund, a donor advised fund that can make grants to any 501(c)(3), including other charitable funds at Cobb Community Foundation. As needs arise that can be met by the ACC Employee Assistance Fund, The Charles Luckey Donor Advised Fund grants the amount needed to the employee assistance fund. This also allows for additional funds to be added through grants to the ACC Charlie Lucky Fund for Scholarships if the occasion should arise when the balance of that fund is insufficient to meet scholarship objectives. But if no funding is needed for scholarships or employee assistance, the board has the option to meet other needs in the community through charitable grantmaking, to the extent allowed by its bylaws.

This is just one more example of how CCF helps its fundholders help our community to thrive.

2022 SCHOLARSHIP FUNDS



SCHOLARSHIP FUNDS

Cobb Community Foundation partners with donors and corporations to further the education of deserving students through scholarships. Management of these scholarships requires an understanding of IRS laws and best practices. Cobb Community Foundation has the expertise and staff to fully manage all aspects of the scholarship process or advise donors on ways to retain some level of participation.



Marietta Country Club Scholarship Fund – The Board of Directors of the Marietta Country Club Scholarship Fund created this scholarship opportunity for employees and their dependents to help them reach their full potential by continuing their education.

\$48,000 in CCF Scholarship Funds Awarded to 20 Students for the Fall 2022 Semester

The cost of higher education continues to increase year after year, with the average cost of college tuition in Georgia in 2020-2021 at over \$14,000 per year. This makes scholarship funds more important each year. In 2022, Cobb Community Foundation awarded over \$48,000 in scholarships to 20 local students for the fall 2022 semester. These scholarships were created and funded through the generosity of individuals, community organizations and businesses that believe in the importance of education. Each award amount is different as they depend on the size of the scholarship fund and the number of qualified applicants.

Three new scholarships opened this year and we anticipate reaching more eligible students in the coming season, which means more scholarship awards. Scholarships are granted for educational expenses at accredited colleges and universities and can be applied towards tuition, books, and mandatory fees.



"Growing up with numerous amounts of adversities, it's only taught me to work harder. I try to keep a growth mindset in place when things don't go my way..."

-Chibuzo Ibuoffor, Winner of Morgan Thomas Scholarship





FOSTERING EDUCATION SCHOLARSHIPS

The Fostering Education Scholarship was created in 2021 to address the financial challenges faced by students aging out of the Georgia foster care system who would like to pursue higher education. The instability of life in foster care often proves to be a distraction from learning and school performance. As one applicant shared in their essay, "We have no control over where we will go and where we will live, or what foster parents we will get." Financial resources, mentorship, support, and stability are not commonly available to help these individuals complete degree programs that lead to well-paying, stable employment.

This is the reason why caring individuals in our community have joined together to fund these awards. Everlean Rutherford, Isaiah Wilcox of Village Connection and Melissa Conti of Innovative Fitness were brought together through CCF because of a shared vision to improve the lives of these resilient youths aging out of foster care by helping them reach their educational goals through scholarships.

Three of these new scholarships were awarded for the first time for the fall 2022 semester to offset the financial burden of earning a degree.

"We had no control over where we will go and where we will live, or what foster parents we will get."



Recipients of the first-time distributed scholarships are:



Thinh Nguyen, age 18, who will attend Georgia State University.



Collins Arrey, age 18, who will attend Albany State University.



Tianya Hunter, age 19, who will attend the College of Coastal Georgia.

AGENCY FUNDS

Agency Funds are established by nonprofits to avail themselves of the security, resources, and services of a community foundation, and to provide an additional avenue for the receipt of contributions. The use of an agency fund allows the charity to focus more time and energy on its mission.



Mostly Mutts Fund – Reduces the number of animals euthanized at local shelters in metro Atlanta by working closely with animal control officers to save adoptable dogs providing housing, health care, training, and physical and emotional care to them until they can be placed in a new home.

Marietta Garden Center Fund – Promotes a love of gardening, horticultural education, protection of native trees, wildflowers, pollinators, and birds and encouragement of home and civic beautification through gardening and nature conservation.

Southern Center for International Studies Fund – Expands the knowledge and understanding of our citizens about the world and America's role in it through digitalized social studies curriculum.

Aloha to Aging Fund – Empowers family caregivers, aging care recipients, volunteers and the community in a positive, nurturing manner through quality, targeted programming.

Tillman House Resource Center Fund – A resource center focused on serving the needs of the community and breaking the cycle of poverty one relationship at a time.

Advocates for Children Endowment Fund – Provides services to children and families who have been the victims of abuse and neglect, and offers multiple layers of personal care through an array of programs to reduce the incidence of child abuse.

Waymark Foster Fund – Helps youth in Georgia's foster care system successfully transition to adulthood by creating the structure and space for caring volunteers to provide skills, support, and critical relationships.

ServeComm Fund – Responds to communities who are facing crisis by connecting people with urgent resources to make communities whole again.

Goshen Valley Fund – Provides hope and healing to foster youth and vulnerable families to cultivate personal healing and generational change through transitional housing and additional therapeutic programs.

Food Security for America Fund – Expands the emergency food pantry model throughout Georgia and nationally. Through food security groups that enable individuals and families to reach their fullest potential by fostering fellowship, community, and good health.

Tommy Nobis Legacy Scholarship Fund – A national award-winning nonprofit training agency dedicated to providing vocational education and employment services to individuals with disabilities.

One Cumberland Fund – Works to enhance the Cumberland community by creating opportunities for adventure and discovery by multiplying, amplifying and connecting rich experiences that elevate Cumberland for residents, businesses, investors, and visitors.





ONE CUMBERLAND FUND

The inaugural meeting for One Cumberland's Board of Directors launched Cumberland's first community nonprofit organization. One Cumberland, founded by the Cumberland CID, was established to help bolster the work of the Cumberland CID by enhancing and broadening its reach, funding, and impact.



In anticipation of their work through targeted grants and charitable giving, One Cumberland also launched the One Cumberland Fund through Cobb Community Foundation. After working diligently for months completing steps to get their new nonprofit started, the leadership at the Cumberland CID was pleased to learn that opening a fund at CCF was a turnkey solution. From the convenient and fast opening of the account to the administrative services around acknowledging and tracking donations for easy IRS reporting, this new undertaking was uncomplicated.

"We are proud and excited to partner with Cobb Community Foundation," said Kim Menefee, Executive Director of the Cumberland CID. "Cobb Community Foundation has a rich history of community involvement by having a substantial, positive impact on Cobb County. Their reputation will bring added credibility to One Cumberland, and they will serve as a valuable resource for our organization. I would encourage anyone in Cobb to reach out to them to learn about this wonderful organization."

Today Cumberland is a thriving community made up of more than 3,300 businesses that support 84,000 employees, 30,000 residents and thousands of visitors each year who enjoy the many assets found in Cumberland. Whether it is bringing together the right stakeholders to fund a park project or engaging diverse neighborhoods to activate creative art amenities, One Cumberland will be the connection that will unite the community as it continues to grow and flourish, and the One Cumberland Fund will help fuel these projects.

TOMMY NOBIS

For over 45 years, the programs of the Tommy Nobis Center (TNC) have been changing lives by championing workplace success for people with disabilities. Through the extraordinary efforts of Bobbie Knopf, a Georgia special education teacher, Joyce Slaughter, a parent of a child with disabilities, and legendary Atlanta Falcon





football icon Tommy Nobis, together they created the Tommy Nobis Center, and this ambitious idea was brought to life. Begun as a vocational center for young people with special needs, it has grown to develop innovative programs and partnerships in schools and in the business community.

Many students with disabilities lack the expertise and confidence to drive their own path forward to successful employment. Skills taught through TNC programs include self-advocacy, computer skills, work readiness, vocational training, and more. Their job placement services have proven to be an invaluable resource, and thousands of lives have been changed through their services in Georgia.

"We believe that all students seeking TNC's support deserve the chance to reach their fullest potential, regardless of their ability to pay for services. In an effort to ensure all eligible youth have access to TNC programming, we have created the Tommy Nobis Legacy Scholarship," said Dave Ward, TNC President and CEO. This scholarship, open to young adults with a disability, will help to fund programs that directly serve youth seeking vocational education and training through TNC, giving them the resources and opportunities they need to thrive.

The Tommy Nobis Legacy Scholarship Fund will help to create and expand opportunities for young people with disabilities who simply want to live their best, most purposeful lives.

"We are proud and excited to partner with Cobb Community Foundation,"

– Kim Menefee, executive director of the Cumberland CID



HOWARD KOEPKA COLLABORATIVE SPIRIT AWARD



This award was created to honor the life and collaborative spirit of the late Howard Koepka, a much-loved community organizer known for asking everyone everywhere, "How can we

help you?" In her introduction of Koepka as the recipient of the 2020 James L. Rhoden Visionary Philanthropist of the Year, CCF CEO Shari Martin spoke fondly of Howard and all the good work in which he took part-- especially the Food Fleet initiative during the pandemic. "I can't begin to tell you all that this man has done." And we imagined him doing so much more. But we didn't know then that he would only be with us 10 more months. "Despite his passing, his influence lives on. He awakened in many of us a spirit of collaboration, and that spirit is alive and well among all the nonprofit teams with whom he worked."

The Collaborative Spirit Award honors not just Koepka, but those organizations who embody his collaborative spirit. Sweetwater Mission was named the recipient of the first annual Howard Koepka Collaborative Spirit Award, an award that in its inaugural year carried with it an unrestricted grant of \$10,000 and was presented alongside the Cobb Collaborative's presentation of the 2022 Human Services Awards.

Debbie Ginocchio, Director of Strategic Partnerships & Fundraising at Sweetwater, worked closely with Koepka and joined Executive Director, Pat Soden, in accepting the award. Struggling to hold back emotion, she said "We are able to do so much more together. That's what Howard used to say, and I think about that every day."

The \$10,000 grant was made possible by S.A. White Oil Company. Kim Gresh, President of S.A. White, and her team worked closely with Koepka and the Food Fleet throughout the pandemic providing fuel for refrigerated trailers over a 16-month period. "Howard inspired more collaboration than I have ever seen, and the results were incredible."

"Howard never considered what just he or his organization could do but instead what the collective 'we' could do."

> - Shari Martin, CCF President & CEO





"Howard never considered what just he or his organization could do but instead what the collective 'we' could do," said Shari. "There really is no limit to what we can accomplish when we work together, and Sweetwater exemplifies that."

VISIONARY PHILANTHROPIST





"Shelley is truly a driving force behind much of the good that happens in Cobb County. We are thrilled to be able to honor her in this way."

– Kim Gresh, CCF Board President

2022 JAMES L. RHODEN VISIONARY PHILANTHROPIST OF THE YEAR – SHELLEY ELDER

Shelley is a partner at Crane Elder Law Firm where she works with her son Stephen Crane. Their firm is well known for compassionately working to meet the needs of the community. We are proud to name Shelley Elder as this year's recipient of the James L. Rhoden Visionary Philanthropist award.

CCF Board President Kim Gresh was the presenting speaker and praised Elder for her commitment to our community. "She gives of herself quietly and without any need to call attention to herself, and without any expectation of reward or return. Shelley has a core value of giving back and donates 25 percent of her gross income to charitable causes. But she doesn't just give financially, she gives her time. Shelley serves on the boards of the YMCA, LiveSAFE Resources, The Extension, Cobb County Schools Foundation, Kennesaw Public Safety Foundation, North Cobb Rotary, Town Center Alliance, and Kennesaw Business Association. She has been a part of too many initiatives to name," said Gresh.



In conjunction with its 10th anniversary in 2003, this award was created by the CCF Board of Directors in the name of CCF Founder, Jim Rhoden. The award is voted on annually by CCF board members to recognize and honor a Cobb business and community leader making significant contributions to our community through their gifts of time, talent, and treasure.

AWARD RECIPIENTS

2021 - Skip Harper

2020 - Howard Koepka

2019 - Bob Kiser

2018 - David and Brittney Bottoms

2017 - Governor Roy Barnes

2016 - Valerie Voyles

2015 - Ron Francis

2013 - Doug Hertz

2012 - Bob Prillaman

2011 - Doug Chaffins

2010 - Fred Bentley, Sr.

2009 - Sam Olens

2008 - Jerry Nix

2007 - Earl Smith

2006 - Larry Freeman

2005 - Bob Moultrie

2004 - Bob Elsberry

2003 - James L. Rhoden, Jr.

PROFESSIONAL ADVISORS NETWORK



We believe that charitable giving done well can create a lasting impact. We created our **Professional Advisors Network (PAN)** to bring together professionals who help their clients with their charitable giving. Through the sharing of ideas, expertise and experiences, giving done well is done even better, and for the community, the client, the client's family, even for the advisor, its impact is magnified. In 2022, we created opportunities for professional advisors to come together to share more ideas at networking breakfast and lunch networking opportunities as well as local fun spots for social events.

PAN Connects - These networking events for our Professional Advisor Network (PAN) members allow us to connect in small groups to grow referral networks and to expand attendees' knowledge of charitable giving, legacy building and opportunities for community impact.

PAN Event at dk Gallery May 2021

We gathered together with our Professional Advisor Network for a lively reception at dk Gallery on the Marietta Square. We heard from the leadership team and some of the members on the ways they have been inspired by their experiences with Cobb Community Foundation.

"One of the greatest values CCF offers are relationships. They were able to guide us in meeting our goals. People need to be connected. It's so powerful,"

– Walt Helms, Principal at Nease, Lagana, Eden & Culley



Professional Advisor Network Member Profile: Tammy Guelfo, CPA, HLB Gross Collins, P.C.

Tammy Guelfo is the firm's Client Accounting and Advisory Services practice leader, and the head of its Kennesaw office. With over 20 years in practice, she has extensive experience in tax planning and preparation for individuals as well as various types of businesses including many nonprofits. An active PAN member, Tammy has used the membership to learn more about how to best help her clients.

Tammy's experience with Cobb Community Foundation started years ago when she first began working with MUST Ministries. MUST has two funds at CCF which created numerous opportunities for us to interact. When she was nominated in 2021 by HLB Gross Collins CEO, Michael Bohling, for our Professional Advisor Network, she eagerly accepted the opportunity to be a part of a group that is committed to serving the greater good in a collaborative environment.

Since then, Tammy has become one of our biggest cheerleaders. "I am thankful to be a part of Cobb Community Foundation for many reasons, the first of which is that I am passionate about serving nonprofits and CCF helps me to do that more efficiently. The organization works with many nonprofits and is dedicated to addressing the needs of the organization, the donors, and the community in which they operate. They are a valuable resource for questions and are always very responsive when called upon. Shari and her team demonstrate what it means to go above and beyond when serving the community."

In 2022, when client, John Alday, began to think more about how he could give back to his community, Tammy was able to share the benefits of partnering with CCF not only from a tax standpoint, but from a value perspective as well. "When donors are passionate about making a difference in the community, CCF facilitates connections and provides resources that maximize the donor's impact. This gives the donors peace of mind knowing that CCF's oversight and nonprofit vetting process ensures their wishes are being served. They make giving easy by providing recommendations that match the donor's charitable interests."

Professional advisors like Tammy play a crucial role in educating their clients about tax-efficient charitable giving. While many nonprofits face the challenge of increasing impact with limited funds, proper financial guidance is important. Tammy plays a crucial role in educating clients about tax-efficient charitable giving and how their local community foundation can help them make an impact.

Scan QR code to view more about our



Professional Advisors Network

2022 PAN MEMBERS

Richard Bennett | Bennett Thrasher | Wealth Manager

Michael Bohling | HLB Gross Collins | CPA

Gary Bottoms | The Bottoms Group | Insurance Advisor

Tripp Boyer | Boyer Ramey Wealth Mgmt Group | Financial Planner

Elizabeth Burdette | SignatureFD | Attorney

Michael Covington | Truist Wealth | Wealth Manager

Alan Cox | Ronald Blue Trust | Wealth Manager

Mike DeWitt | Brightworth | Wealth Manager

Bridget Dunk | Bennett Thrasher | CPA

Shelley Elder | Crane Elder Law Firm | CPA

Kristi Epp | Frazier & Deeter | CPA

Hunter Ewing | High Ground Company | Insurance Advisor

David Fisher | SignatureFD | Wealth Manager

Megan Richards Flores | Gregory Doyle Calhoun & Rogers | Attorney

Melissa Gilbert | Gregory Doyle Calhoun & Rogers | Attorney

Chris Gruehn | Pinnacle Financial Partners | Wealth Manager

Tammy Guelfo | HLB Gross Collins | CPA

Todd Hall | Mariner Wealth Advisors | Financial Planner

Stacy Haubenschild | Henssler Financial | Wealth Manager

Walter Helms | Nease, Lagana, Eden, & Culley | Insurance Advisor

2022 IMPACT REPORT

Bob Heuel | Mauldin & Jenkins | CPA

Wade Hill | SignatureFD | Financial Planner

Joseph James | Coker James | CPA

Jeffrey Jones | Owenby Jones Wealth Mgmt | Financial Planner

Curtis Kimball | Williamette Mgmt Associates | Wealth Manager

Daniel Lee | Dan Lee & Associates | CPA **Todd McMullen** | Moore Colson | CPA

Terri Munro | WA Asset Mgmt | Financial Planner

Steven Murphy | Moore Colson | CPA

Ican Osinjolu | Raymond James | Financial Planner

Casey Patrick | finoBlue Planning Group | Financial Planner

Christine Phelps | Sage Mountain Advisors | Wealth Manager

Robert Petmecky | Petmecky Law Group | Attorney

Casey Smith | Wiser Wealth Mgmt | Wealth Manager

Michael Sute | Sute CPAs | CPA

Susan Tillery | Paraklete Financial | Financial Planner

Tony Turner | Cohen Pollock Merlin Turner | Attorney

Russell Wood | Homrich Berg | Financial Planner

Rhett Zeigler | Magnolia Trust Company | Trust Officer



WHO IS COBB COMMUNITY FOUNDATION

Cobb Community Foundation (CCF) creates and supports opportunities for everyone in and around our community to thrive. We help those who give and serve make a greater impact by creating charitable funds tailored to the donor's objectives, magnifying generosity by pooling resources to address community needs, and fostering collaboration between and within both sectors and geographies to create long-term positive change.

OUR HISTORY

CCF was established in 1993 as a local fund of the Community Foundation of Greater Atlanta. In 2005, our own 501 (c)(3) designation became effective. Since then, we have awarded \$16.3 million in grants and scholarships.

CORPORATE CHAMPION PROGRAM

We are proud to recognize our Corporate Community Champions who believe that good corporate citizenship involves supporting charitable endeavors that are impacting the community. Funding provided by Corporate Community Champions is a major source for Cobb Community Foundation's grants to organizations making an impact in key areas of need in the county.

2022 CORPORATE COMMUNITY CHAMPIONS



BRONZE

Ameris Bank • Atlanta Country Club • Cumberland Diamond Exchange • Mopdog Creative + Strategy • Smith + Howard • Synovus

PARTNER

Barnes Law Group • dk Gallery • Fortress Builders (W&H Investments) • Marietta Country Club • Mauldin & Jenkins, LLC
Paraklete Financial • Renasant Bank • ServIT • The Bottoms Group