

Our
Community
Foundation



2021 Annual Report

Our Community Foundation
For a Greater Birmingham





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Letter from Leadership

DEAR DONORS, PARTNERS & FRIENDS,

Similar in many ways to the prior year, 2021 was a year filled with numerous changes – and while it was a challenging year for so many, we saw our community respond with hope, generosity and a shared vision for a better future for the Greater Birmingham region.

Thanks to the contributions of hundreds of donors, primarily through their Donor Advised Funds, we distributed more than \$23 million in grants to benefit our community this year. Here are a few of the things we were able to accomplish in 2021 because of the generosity of donors:

- A strategic grant from the Foundation provided the support needed to secure \$7 million in state funding for a Mental Health Crisis Center in our region which will provide comprehensive care while diverting patients from emergency rooms and jails.
- The Foundation partnered with Casey Family Programs, a nationally renowned foundation, and established the Greater Birmingham Community of Hope, a coalition working to address persistent poverty and support children and families while securing \$240,000 in outside funding.
- The Foundation made its largest grant ever totaling \$1.15M to grow small, underserved businesses throughout our region while strengthening our community based financial infrastructure.

These stories and others that you will read in this annual report illustrate the impact of collective philanthropy and how it can be used to address complex needs and effect the lasting change that moves our region forward.

When we look back on all we were able to accomplish over the last year there is one constant – your generosity.

We are honored to serve as your platform for philanthropy, the steward of your generosity and your partner in serving the needs of our region. Our mission at the Community Foundation is to inspire passion for transformational change and you are our inspiration for that mission – every day.

Thank you,

Cathy Wright,
Board Chair

Christopher Nanni,
President & CEO

Together we can achieve our shared vision of a just, prosperous and unified region where every person is empowered to reach their full potential.

Vision

A *just*, prosperous & unified region where every person is empowered to reach their full potential

Mission

To *ignite* passion for transformational change

Values

INCLUDE • INNOVATE • INSPIRE • LEAD



2021 - 2022



Our Year in Review

THIS PAST YEAR, WE GRANTED OUT MORE THAN **\$23 MILLION** THROUGH BOTH DONOR-DIRECTED GRANTS AND GRANTS REFLECTING THE FOUNDATION'S FIVE STRATEGIC PRIORITIES. THE DONORS WHO MAKE THESE GRANTS POSSIBLE ARE THE LIFEBLOOD OF OUR FOUNDATION. WE ARE PROUD TO PARTNER WITH THEM AS WE WORK TOGETHER FOR A GREATER BIRMINGHAM FOR EVERYONE.

A SHARED VISION FOR HOPE

Igniting passion for transformational change is the mission of the Community Foundation of Greater Birmingham.

For more than 60 years, we have helped generous individuals, families and businesses turn their passion into impact. Through our grantmaking and initiatives we partner with communities, nonprofits and stakeholders to take on some of our region's most complex challenges to realize our shared vision of a better future for all.

Financials



2021 OVERVIEW

\$299.7M

Total Assets

\$23.3M

Grants in 2021

\$30.1M

Gifts in 2021

557

Grantmaking Funds

\$527M

Total Grants
Since 1959

1959

Year Founded

COUNTIES SERVED

Blount, Jefferson, St. Clair,
Shelby and Walker counties

As of 12/31/21 (unaudited)

2021 Community Grantmaking Highlights

FOUNDATION DIRECTED GRANTS

Flexible Funds include Community Impact Funds, Field of Interest Funds and Catalyst Funds.

\$4.4m

Total amount awarded through Flexible Funds in 2021

140

Number of Grants

\$2.8m

To support our Five Priorities competitive and proactive grantmaking

\$1.6m

Awarded through Field of Interest & Catalyst Funds to support Foundation priorities & initiatives

GRANTS BY STRATEGIC PRIORITY AREA



- Economic Opportunity for All, 43%
- Thriving Communities, 25%
- Equity and Inclusion, 22%
- Persistent Poverty, 8%
- Regional Cooperation, 2%

DONOR DIRECTED GRANTS

OUR DONORS SHARE A VISION FOR A BRIGHTER FUTURE

The last two years have shown us that the spirit of giving that exists in our region has never been greater. We see it in our growing community of donors – individuals, families and businesses united in a shared vision of a better tomorrow through philanthropy. We are proud to say that our donors continue to set records for charitable giving, providing vital support for the nonprofits that are working toward a brighter future for our community.

If you’re looking for a way to elevate your giving, a Donor Advised Fund may be for you.

With a Donor Advised Fund, you stay directly involved with grantmaking by serving as a fund advisor and recommending grants from the fund to your favorite charities. And you can involve your family, too, by involving your children in the fund as advisors. By establishing a Donor Advised Fund, you can leverage the professional services of the Community Foundation – including getting help with vetting nonprofits. Donors can also co-invest with the Community Foundation in our competitive grantmaking. The flexibility of a Donor Advised Fund makes it an easy and convenient option to manage your giving and amplify your impact.

Learn more at cfbham.org/giving.

Donor Advised Funds at the Community Foundation supported a diverse range of causes, including:

- EDUCATION
- FAITH ORGANIZATIONS
- FAMILY & SOCIAL SERVICES
- COMMUNITY & ECONOMIC DEVELOPMENT
- HEALTH
- ENVIRONMENT
- ARTS & CULTURE





STORIES OF GIVING:

Family Philanthropy



FOR CATHY AND TOM ADAMS, PHILANTHROPY IS A FAMILY AFFAIR. YEARS AGO, CATHY, TOM, AND THEIR CHILDREN DECIDED THAT, INSTEAD OF EXCHANGING GIFTS, EACH CHRISTMAS THEY WOULD DONATE FUNDS TO A CHARITABLE ORGANIZATION. EVENTUALLY, THEIR GRANDCHILDREN GOT INVOLVED TOO. IN 2010, THE ADAMS FAMILY CREATED A DONOR ADVISED FUND THROUGH THE COMMUNITY FOUNDATION OF GREATER BIRMINGHAM WHICH THEY NOW USE TO MAKE GRANTS TO THEIR FAVORITE NONPROFITS.

CATHY AND TOM ADAMS CREATE A FAMILY LEGACY

Getting together as a family – whether in person or through a Zoom call – to discuss which organizations they should support is key.

“My son lives in Denver and my daughter lives in New Orleans, so it’s a wonderful but rare opportunity when we all get together physically in the same place. So, when we discuss any grants we want to make it’s a way to keep us connected,” Cathy says. “We’re all in this together so we all need to be on the same page and that’s made us stronger as a family. That’s one reason I would recommend this to other families.”

Photo: Three generations of the Adams family share a passion for philanthropy

STORIES OF GIVING: FAMILY PHILANTHROPY

"We get to be a part of something that we see changing lives. We're seeing it work and that's tremendously fulfilling," Cathy says. "They've given us a lot more than we've given them."

The Adams family donates to a number of causes, including natural disaster relief efforts and groups addressing climate change. But one of Cathy's favorite organizations to support is the Determined To Be Mentoring & Leadership Program (D2B), a mentorship program for young men ages 9 to 19 in the Birmingham metro area.

A few years ago, Cathy heard D2B founder Milton King speak at a meeting for residents and stakeholders of the Kingston neighborhood, which is where many D2B participants live, and she immediately knew she wanted to support King's work.

"I had never heard anybody talk about something with quite that much passion and determination and a genuine love for these young men and I wanted to be a part of that," Cathy says. "His enthusiasm was just contagious."

D2B participants meet with mentors twice a month for a wide range of activities, from fun outings to the Alabama Theatre to spending the day cleaning up the Kingston neighborhood or helping elderly residents with yard work.

"It's a hand up for these kids and not a hand out," Tom Adams says. "The mentors spending time with these kids are setting examples that they can do anything if they will put out the effort to do it."

Along with supporting D2B through her fund at the Community Foundation, Cathy volunteers her time. She helped connect D2B with the Botanical Gardens to plant a teaching garden in the Kingston neighborhood for D2B participants.

"They're learning science tending the garden and a few of them have expressed interest in going into

a horticulture career," says Cathy, who often works in the garden too.

Cathy believes that programs like D2B give young people the confidence boost they need to go after their goals and to enrich their communities.

"I want Milton King to get national recognition and I want men in other cities to say, 'If he can do this, I can too,'" Cathy says.

Cathy hopes that her grandchildren will contribute their time and money to organizations that make a direct impact on the lives of others, programs like D2B.

"We get to be a part of something that we see changing lives. We're seeing it work and that's tremendously fulfilling," Cathy says. "They've given us a lot more than we've given them."



Photo: Cathy and Tom Adams volunteer at the D2B Teaching Garden in Kingston

STORIES OF GIVING:

Partners in Philanthropy

SIMPLIFY GIVING, AMPLIFY IMPACT

FRIENDLY ADVICE LEADS TO CHARITABLE IMPACT

Bruce Denson says his only regret with starting a Donor Advised Fund with the Community Foundation of Greater Birmingham is he wishes he had done it sooner.

“I wish I had known about the Community Foundation earlier in my life because I would have given more money,” Denson says. “It’s a great vehicle to give money in perpetuity to charities in Birmingham.”

Denson learned about the Community Foundation from his friend and estate planning advisor Lloyd Wilson. A chat with Wilson helped Denson decide to create a fund with the Foundation that will support his favorite nonprofit organizations now and for years to come through an IRA donation and a Charitable Annuity Trust. The Foundation will also give guidance to Denson’s children when it’s time for them to take over the fund.

Denson’s goal for his fund is two-fold. He wants to lend a helping hand to those in the Birmingham area who need it and he wants to give back to the local institutions that helped him become who he is today.

“I love Birmingham,” Denson says when asked why he wants to help the city thrive. “It’s a great city with great people. I’ve lived here my whole life and I wouldn’t consider living any place else.”

Growing up, Denson attended Birmingham University School – a predecessor of The Altamont School. “Birmingham University School was very foundational for me in my life,” says Denson, who went on to serve on the board of Altamont for 31 years.

The Altamont School is one of the organizations Denson will contribute to through his Donor Advised Fund. The fund will also contribute to St. Luke’s Episcopal Church – which Denson has attended since childhood – and to the United Way of Central Alabama.

“I’ve been blessed to have made some money in my lifetime,” says Denson, who had great success as chairman of the insurance brokerage firm Cobbs Allen. “And I feel an obligation to give back.”

PARTNERING WITH PROFESSIONAL ADVISORS

The Community Foundation works with advisors like Lloyd Wilson, president of Lloyd R. Wilson & Associates, to help integrate their clients’ business, personal and financial decisions, and tax-planning needs with customized charitable plans that reflect their giving priorities. Advisors like Lloyd are our most frequent source of referrals and we could not be more grateful for their partnership and trust.



Photo: Bruce Denson & Lloyd Wilson
To learn more visit cfgham.org/giving.

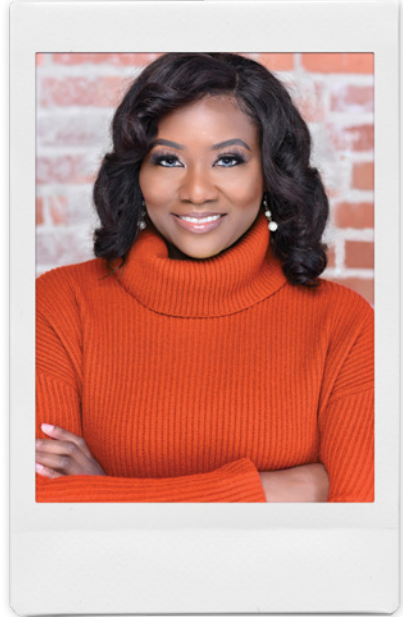


Photo: Marsha Morgan

STORIES OF GIVING:

Philanthropy Reimagined

BIRMINGHAM CHANGE FUND MEMBERS KNOW THAT PHILANTHROPY IS MORE THAN MONEY

There was a time when Marsha Morgan didn’t consider herself a philanthropist.

“When I would hear the word ‘philanthropy,’ I equated it with people who were multi-millionaires or were very famous,” Morgan says.

That all changed when she became a founding member of the Birmingham Change Fund, a giving circle of local Black professionals who partner with the Community Foundation of Greater Birmingham to award grants to organizations working to improve the lives of African Americans in the Birmingham area.

“It was very important for us to root ourselves here in the community,” Morgan says of the group’s decision to become a component fund of the Community Foundation.

Members of the Birmingham Change Fund also participated in the Foundation’s Equity and Inclusion request for proposal process last spring.

“That speaks volumes to them understanding that we are a resource,” Morgan said of the Foundation. “We don’t have all the answers, but community knows what community needs. It makes a difference when you have people who are engaged in the community able to actually help navigate funding to make sure that vulnerable populations are being served.”

Working with the Birmingham Change Fund and learning more

about the contributions of local non-profits caused Morgan to rethink what philanthropy really means.

“BCF helped me understand philanthropy in its purest sense,” she said. “When I would see my mom serving in church, when I would tutor, or the way the community rallies together when someone has had a house fire – that’s philanthropy. Time, talent, treasure, testimony — philanthropy is giving all of those things. BCF showed me that.”

The Birmingham Change Fund also showed her there’s power in numbers.

“BCF helped me understand the importance of working strategically and intentionally to create change and leveraging resources collectively in my community,” Morgan says. “It’s great that I give, but if we all pool our resources together, we can really make a difference.”

STORIES OF GIVING: Giving Together

HELPING DONORS MAKE A DEEPER IMPACT

For Elliot and Bette Bell, partnering with the Community Foundation has allowed them to give grants to a wide variety of local programs working on the causes they care about most – education, environmental awareness, and addressing poverty.

“Without the Community Foundation, our impact would be a lot smaller and a lot less diverse,” Elliot says. “Giving Together offers us an opportunity to see other ways to make gifts than what we’re used to.”

They’ve awarded grants to programs like Youth Towers – which helps young people who have aged out of the foster care system find safe and affordable housing. They’ve created a fund to award Jefferson County teachers for excellent work.

They’ve given to Jones Valley Teaching Farm and done site visits to see firsthand the work being done there. The Bells have learned about and donated to initiatives in support

of Birmingham’s Hispanic community and LGBTQ residents, too.

“There are so many great programs that we’ve opened our eyes to,” Bette says, adding that this has been possible because the Community Foundation keeps its finger on the pulse of the local nonprofit ecosystem.

The Bells are most proud of the fact that they recently worked with the Community Foundation to create an endowment for Ruffner Mountain Nature Preserve. It’s a special place for them. The couple met decades ago while volunteering at Ruffner Mountain and fell in love.

“We went for a walk in the wildflowers and he proposed six months later,” Bette remembers fondly.

The Bells have a vision of a better Birmingham and while they know systemic change is needed, they also know that their contributions can make a difference.

“It’s a slow and steady pace,” Bette says, “but having a team like the Community Foundation that’s on the same page, I know we’re moving in the right direction.”

The Community Foundation’s Giving Together program invites donors to co-invest with the Foundation as part of our community grantmaking process. Through Giving Together donors have the ability to learn about exciting and innovative funding opportunities and support creative programs that are meeting critical local needs.

*Photo: Bette and Elliot Bell
(Courtesy of Walter B. Gonsoulin Jr., Ph. D.)*



Photo: Through their Donor Advised Fund and Giving Together, Bette and Elliot Bell have supported the work of Jones Valley Teaching Farm.



The Enduring Legacy of Endowment

A LASTING LEGACY A DONOR'S LEGACY WILL GIVE BACK, FOREVER, TO THE COMMUNITY SHE CALLS HOME

June Fletcher may have been born and raised in Chattanooga, Tennessee, but she considers Birmingham home. She's lived in the Magic City for 30 years.

"Birmingham has been good to me," Fletcher says. So she wanted to find a way to give back to Birmingham for years and years to come.

In 2020 she established an endowed Legacy Fund with the Community Foundation of Greater Birmingham by adding the Foundation to her will.

"I don't have any children so I want all that I have to go to people that would use the money the way that it was intended to be used," Fletcher says. She turned to the Community Foundation for help. Working with the Foundation's staff, she was able to select several nonprofit organizations that will receive funds from her estate.

"It was a great way to pick things that were meaningful to me," she says.

Fletcher, who retired as executive director of the American Red Cross Blood Services Alabama Region, has a wide range of interests, including nature and theater arts.

Her fund will give to 14 organizations including the Alabama Wildlife Center, the Cahaba River Society, Central Alabama Theater, Ruffner Mountain Nature Preserve, Birmingham's public radio station, and the local YMCA. Because the fund is endowed, it will provide support to these organizations for years to come.



Photo: June Fletcher, retired executive director of the American Red Cross Blood Services Alabama Region

Fletcher says she has donated to or volunteered with most of the organizations that her fund will help.

"I want that support to go on," she says. And through her Legacy Fund with the Community Foundation it will.

A LEGACY THAT GIVES FOREVER A GIFT MADE 50 YEARS AGO STILL POWERS THE WORK OF THE FOUNDATION

For almost 50 years, a gift in Margaret Spain's will has been the fuel for our Community Impact Fund that supports the Foundation's competitive grantmaking. The Frank and Margaret Spain Fund was established in 1972 through a \$3 million unrestricted estate gift. Thanks to the enduring power of endowment, over the last 49 years, the fund has grown to \$20.9 million and granted out more than \$35 million to the community.

Endowed gifts become a part of the Community Foundation's permanent endowment, meaning the Community Foundation works to ensure that they will accomplish your charitable goals and benefit our community forever. Your gift is preserved in perpetuity, with the funds pooled for maximum benefit and invested to achieve long-term capital growth.

To learn more visit cfbham.org/giving/give-tomorrow.



This chart is for illustration purposes only.



Photo: Frank & Margaret Spain

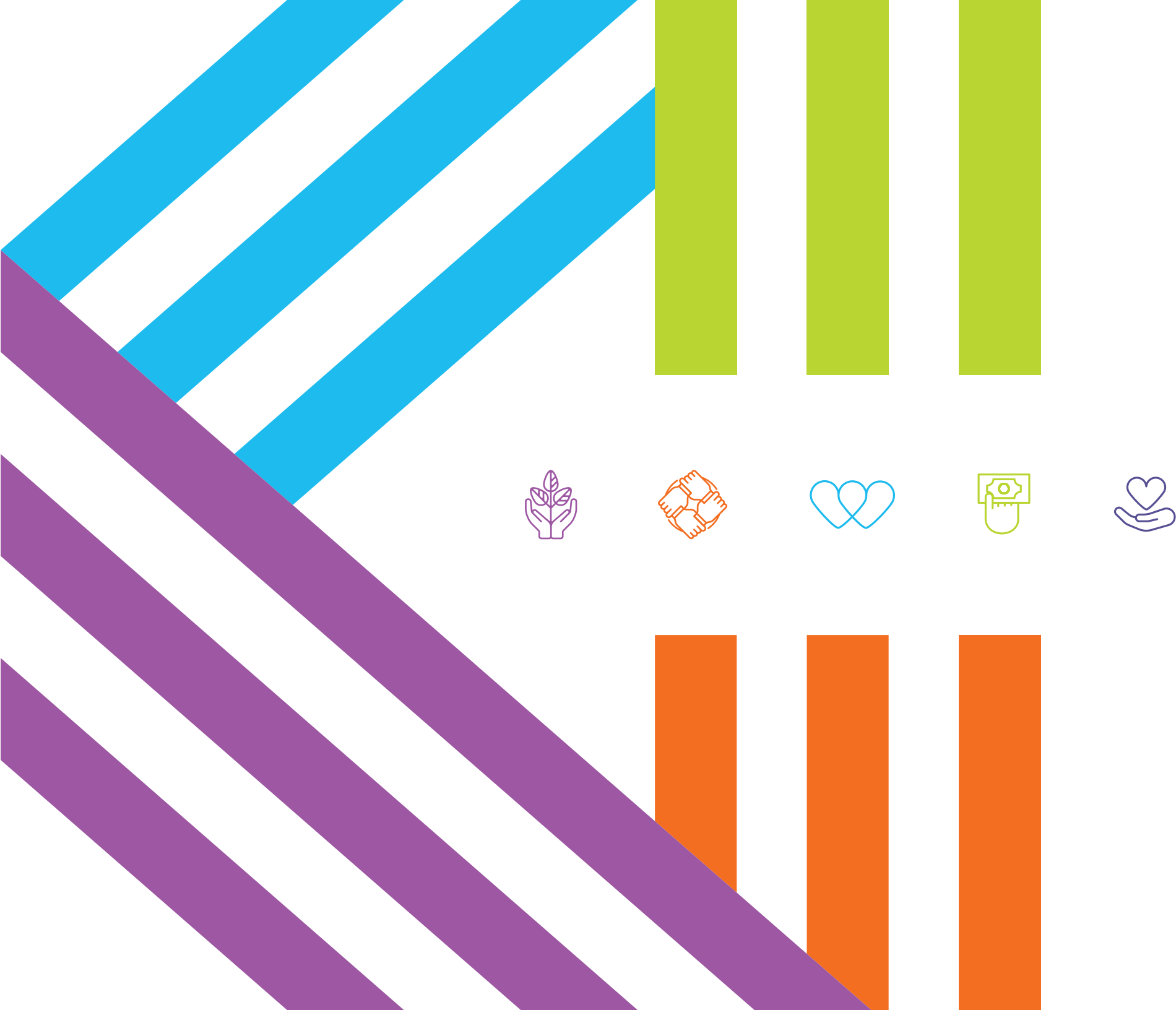
STORIES OF

Impact

AT THE COMMUNITY FOUNDATION, WE WORK HAND-IN-HAND WITH THE COMMUNITIES THAT MAKE THE GREATER BIRMINGHAM AREA HOME. OUR MISSION IS TO IGNITE PASSION FOR TRANSFORMATIONAL CHANGE, SO WE ARE DEDICATED TO BRINGING PEOPLE, RESOURCES AND ORGANIZATION TOGETHER TO TAKE ON IMPORTANT CHALLENGES. THAT MISSION AND THE GENEROSITY OF OUR DONORS IS REFLECTED IN ALL WE ACCOMPLISHED IN 2021.

OUR FIVE PRIORITIES

The Community Foundation focuses on five priorities in our grantmaking and strategic initiative work. These priorities were informed by input from hundreds of community members from across the five counties we serve and include: **Nurturing Thriving Communities; Economic Opportunity for All; Overcoming Persistent Poverty; Driving Regional Cooperation;** and **Fostering Equity and Inclusion.** Under this strategic framework we work in partnership with nonprofits, volunteers and donors to steward the resources left by generations of donors to address the changing needs of our community.



Nurturing Thriving Communities



A TALE OF TWO CITIES

REVITALIZED GREENSPACES ARE KEY TO THE FUTURE OF THESE THRIVING COMMUNITIES

Derrick Mostella was born and raised in St. Clair County in the city of Ashville, where he's served as mayor since 2016. Mayor Mostella loves Ashville and is proud to call it home. But a walk in the local park showed him that something was missing.

"The playground is very much dated," he says. "The majority of the equipment was there when I was a child. It's like stepping back in time."

He is determined to keep Ashville moving forward. Ashville's city park is getting a complete overhaul, in part thanks to a \$20,000 grant from the Community Foundation of Greater Birmingham.

"For municipalities our size, undertaking projects like this is important for our sustainability and our growth, but it's hard, financially, for us to allocate the amount of money that it takes," Mostella says. "Without groups like the Community Foundation stepping up to the plate and seeing the value in the things that we're trying to do, we would still be having conversations about how we're going to find money to pay for these things."

Plans for the new and improved park include a walking trail, a disc golf course, a dog park, and pickleball courts, as well as accessible swings and benches.

"Most people when they think of a park, they think of somewhere that the kids can go play," Mostella says, "but we want it to be a gathering place and we want to be able to offer something for everyone in our community."

Meanwhile, in neighboring Blount County in the city of Oneonta, Mayor Richard Phillips has been busy with a \$10 million park revitalization project of his own. The project will include construction of an aquatics facility and

a multipurpose soccer and football complex, athletic field renovations, and development of more accessible recreation areas.

"I'm a huge proponent of quality of life projects," Phillips says. "And our residents deserve it. They've asked for it for long enough."

ADA accessible playground equipment has already been installed in Woodland Scout Park, in addition to an outdoor basketball court and a dog park, thanks to a \$50,000 grant from the Community Foundation.

"I have never seen that park more used in my life," Phillips says. "People are so excited about it."

Mostella and Phillips both see these park revitalization projects as key to the future of their cities, and these revitalization efforts perfectly align with the Community Foundation's commitment to nurturing thriving communities. Smaller communities especially need amenities such as high-quality greenspace to continue to grow.

"If you're not growing, you're dying, and we see this as an important recruitment tool and retention tool," Phillips says. "We want people to stay here, and we want my generation and the generation below me to want to move back."

And Mostella knows that while people may move to Ashville to escape the hustle and bustle of city life, they still want amenities such as high-quality parks and recreation facilities.

"They may be looking to slow down their pace a bit, but there are certain things they don't want to give up in that move," Mostella says. "We really want this to be a destination place for families and we're going to do our part to make sure that everyone who chooses to call Ashville home has access to great parks and greenspace."

Photo: Mayor Derrick Mostella (Top), Mayor Richard Phillips (Bottom)



Nurturing Thriving Communities in 2021



WHAT MAKES A COMMUNITY THRIVE?

Research shows that to create stronger, more resilient, thriving communities, we must look beyond economic measures to other factors that promote stronger, more resilient, thriving communities. In 2021, grants under our Thriving Communities priority addressed a wide range of programs and services including improving green spaces, mental and emotional wellness initiatives, and performing arts and education programs.

Visit our website at cfbham.org/grants to see a complete list of grants awarded in 2021.





Economic Opportunity For All in 2021



21
GRANTS

\$722k
AWARDED



Economic Opportunity For All

IN GOOD COMPANY IGNITING A CONNECTION FOR SMALL BUSINESS OWNERS

When asked what it takes to uplift an underserved community, Torin Brazzle's answer is simple.

"You've got to start with economics," she says. "It affects every area."

That's why in late 2019, she launched IGNITE Alabama, a holistic ecosystem designed to connect women and minority business owners with the resources and services they need to succeed.

"We have so many amazing organizations, but they weren't talking to each other," Brazzle says. "To maximize those resources, we had to make sure we could get them to the people."

IGNITE's goal is to bridge communication gaps between organizations, service providers, and minority business owners and to ensure these entrepreneurs have access to local, state, and federal funding opportunities as well as any technical assistance they may need. In its first year, IGNITE onboarded 301 program participants and facilitated 128 workshops covering topics such as business development, financial literacy and marketing. The online workshops boasted a total of more than 33,000 views.

Brazzle has thought of everything – including hosting workshops at times that are convenient for entrepreneurs juggling a demanding business schedule. A recent grant from the Community Foundation has helped support IGNITE's work with small and minority owned businesses so they can compete and grow.

IGNITE helped Lensey King revamp the business model for his electrical maintenance and troubleshooting company. Now, instead of simply offering service to residential and small commercial customers, he's

providing industrial maintenance training to manufacturing facilities, which has boosted his profit margins.

"IGNITE challenged us and pushed us in the direction of solidifying ourselves as a competitive business in Alabama," King says. His company has also been awarded over \$20,000 in grants – opportunities he learned about through IGNITE. King also added two contract instructors to his team.

"Torin explained to me the importance of freeing up my time to gain new business," King explained. Adding to his team allows him to attend meetings and travel to secure more projects. "I am in essence getting two to three times the work done in a single day. This all happened as a result of IGNITE."

Brazzle believes that as entrepreneurs have the resources that they need to build their businesses, they can also "fortify their families and themselves personally and as we do that our communities look better," she says. "We even have healthier relationships."

IGNITE has been built on relationships. Brazzle has created an ecosystem of 39 business, financial, legal, mental health, and technical assistance providers that serve minority small business owners. In 2021, the Community Foundation awarded a \$50,000 grant to support the programs of IGNITE and to provide forensic financial analysis and individualized business action plans to more than 200 minority entrepreneurs.

Brazzle says that in addition to the grant, the mentorship she's received from the Community Foundation has been priceless, especially as she's navigated building IGNITE during the pandemic.

"To have that kind of support really kept me from falling apart on some really difficult days," she says.

Moving forward, Brazzle plans to add mental and emotional wellness workshops to her programs for entrepreneurs. "Teaching people to do business is easy," she says. "But we must provide them with tools and strategies to navigate the challenges of life."

Photo: Torin Brazzle, Executive Director of IGNITE with Jennifer and Lensey King

Fostering Equity & Inclusion

SECOND CHANCES

JEFFERSON COUNTY DISTRICT ATTORNEY DANNY CARR IS SOMEONE WHO HAS DEFIED THE ODDS.

"I'm from Ensley," Carr says, "a community where most people would not say you'll one day be the district attorney. But by the grace of God, I'm here."

Sometimes to rise above the tough hand you've been dealt, you must also be given a second chance. And that's exactly what Reset Jefferson County, a program spearheaded by District Attorney Carr, is all about.

Reset keeps young people who've been arrested for low-level, non-violent crimes out of jail and puts them on the path to a new beginning. First-time offenders have the option to stay out of the court system by participating in a community-based program that includes workshops and counseling to hold them accountable and to address the underlying issues that led to criminal behavior.

"With Reset, it gives a young man the opportunity to truly learn the error of his ways," Carr says.

In Jefferson County, more than 500 people aged 17-24 are arrested each year for low-level felonies, such as drug possession and petty theft. Once a felony conviction goes on a young person's record, it can impact everything.

"A lot of the guys and a lot of the families that I grew up with are incarcerated or stumbling through life because of a stupid mistake they made as a young kid," Carr says. "They can't find adequate housing or keep a job because that mistake continues to creep up."

Reset would change this. Inspired by a similar program in New York, Reset is a partnership between the Jefferson County District Attorney's office and Alabama Appleseed Center for Law and Justice.

"There are societal costs to punishing and incarcerating people who aren't dangerous... Reset gives them an opportunity to be treated with dignity."

- Carla Crowder, Executive Director of Alabama Appleseed

"The people who will be eligible to participate in Reset aren't dangerous, so we shouldn't spend those precious resources, nor should we saddle them with the consequences of a felony," says Crowder.

In 2021, the Community Foundation, in partnership with the Instruments of Hope Unity Fund, a field of interest fund at the Foundation, awarded Alabama Appleseed a \$75,000 grant for the program to hire a project coordinator.

Zhaundra Jones of the Community Foundation says Reset perfectly aligns with the Foundation's mission to dismantle inequitable systems. In 2019, 75 percent of people arrested were Black residents, a significantly disproportionate number.

"With Reset, this new policy will create a different narrative around what these young people do or don't deserve," Jones says. "And that's super powerful."

Reset isn't an easy way out for those who have committed crimes or for those prosecuting them. Participating in the program will require dedication just as operating the program will.

"That's the hard work," Carr says. "The easy work is to not do this program and just let things be as they may."



Fostering Equity & Inclusion in 2021



"A lot of the guys and a lot of the families that I grew up with are incarcerated or stumbling through life because of a stupid mistake they made as a young kid. They can't find adequate housing or keep a job because that mistake continues to creep up."

- Danny Carr, Jefferson County District Attorney (Pictured)

THE INSTRUMENTS OF HOPE UNITY FUND

The Instruments of Hope Unity Fund is a Field of Interest Fund at the Community Foundation. Established by founding donors Gail and Jeffrey Bayer, the goal of the fund is to build unity and a greater sense of trust and shared fates in the community.



Overcoming Persistent Poverty

SAFE AT HOME

A COMMUNITY OF HOPE IS FOCUSED ON KEEPING CHILDREN SAFE AT HOME

For 13 years, Alice Westery served as an independent living program coordinator for the Department of Human Resources in Jefferson County. During that time, she noticed that many of the young people she worked with who had aged out of the foster care system would end up back in her office with no place to live.

So, she prayed. “I said, ‘Lord, somebody needs to do something about this.’ Then I thought, ‘Duh!’ Why do you think they’re coming back to you?!”

She decided that she should be the person to do something, and in 2011 she founded Youth Towers, an organization dedicated to helping young people age 19 to 26 secure and maintain safe and affordable housing. In addition to providing transitional housing and rent assistance, the programs at Youth Towers teach money management skills and help young people find employment. If someone needs work boots for a construction job or bus passes to get to work — Youth Towers helps with that, too. In short, Youth Towers seeks to offer young people the knowledge and tools they need to navigate adulthood.

“We holistically look at all of their needs,” Westery says of the wrap-around services her organization offers.

“Those young people, many times, had to raise themselves,” Westery says. “Youth Towers is like that other parent, that parent that’s going to make sure that every resource is accessible.”

In 2021, Youth Towers was awarded \$60,000 in grants from the Community Foundation to support their work. They were one of several grassroots organizations addressing poverty that received additional grants from the Foundation’s Community of Hope partnership with Casey Family Programs.

Photo: Alice Westery, Executive Director of Youth Towers with Tykeirel Jordan, a Youth Towers graduate and her daughter.



"Youth Towers is thankful that the Community Foundation gets it."

- Alice Westery, Youth Towers

GREATER BIRMINGHAM COMMUNITY OF HOPE

One of the Foundation's top priorities is to overcome persistent poverty in our region.

In 2021, the Community Foundation began working with Casey Family Programs to establish the Greater Birmingham Community of Hope, a coalition of local residents, organizations, service providers, and government officials working to support families and prevent the need for children to enter the child welfare system.

Casey Family Programs is a national foundation that works to influence long-lasting improvements to the well-being of children, families and the communities where they live. Using Casey's Community of Hope model, this partnership is working to develop a robust, collaborative approach for improving systems of support for families in the Greater Birmingham area.

When it comes to poverty in our community, the numbers are harrowing. Alabama is the sixth poorest state in the U.S., with 24% of Alabama children living below the federal poverty threshold. Although Birmingham has made some strides in recent years, data from 2009 to 2019 shows that out of the top 53 largest metros in the country, Birmingham is 40th in the relative poverty rate change and 53rd in the change in the relative poverty gap between whites and people of color. That's why the Community of Hope coalition also seeks to address childhood poverty through an equity lens.

"Persistent poverty is persistent because it's infused into the way society is structured," says Gus Heard-Hughes, Vice President of Programs at the Community Foundation. "We know it's a challenge to take on, but through this partnership with Casey we have the opportunity to bring people together around innovative, community-scale strategies."

Despite the staggering statistics regarding poverty in Alabama, Michael Dailey, senior director of strategic consulting at Casey Family Programs, is hopeful about Birmingham's future.

"There's a lot of strength in the community," Dailey says, noting the hard work of local organizations and the City of Birmingham Mayor's Office's commitment to the cause of eradicating child poverty. "We want to help you build on your strengths."

The coalition has been intentional about bringing residents with experience in the child welfare system to the table not just to share their stories, but to help with planning and decision making, too.

Casey Family Programs has a vision of a world where children can stay out of the foster care system and stay safe at home. But to make that dream a reality, poverty must be tackled first.

"Poverty stressors are often factors that contribute to children coming into care," Dailey explains. "So, if we can focus our efforts further upstream, maybe we can prevent the need for child protection involvement."

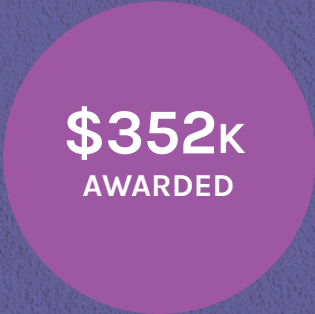
Alice Westery has seen this first hand. Many of the young people Youth Towers serves are also parents. So as Westery helps her clients, she's also helping their children.

"We're not going to have those babies outside. It takes a village to raise a child, but it takes more than a village. It takes a community of hope, a community working to make sure that families are strengthened and that families do not have to rely on the system to get by but instead have the best quality of life."

- Alice Westery, Youth Towers



Overcoming Persistent Poverty in 2021



CASEY FAMILY PROGRAMS

Funding support from Casey Family Programs allowed the Foundation to grant an additional \$65,460 through our Overcoming Persistent Poverty priority to eight grantees, including Youth Towers, that are doing critical work to strengthen and support children and families.



Driving Regional Cooperation in 2021



4
GRANTS

\$97k
AWARDED



"As economies have become more regional in nature, fragmentation is a detriment to economic growth because there is no overarching entity that is able to speak for the region. In a global economy, fragmented regions are behind the starting line in comparison to more regional economies. For this reason, the Community Foundation has provided leadership by serving as a convener working with the Jefferson County Mayors Association and helping to facilitate a group of Jefferson County City Councilors who are eager to work together on regional cooperation efforts."

- Christopher Nanni, President and CEO of the Community Foundation

Driving Regional Cooperation



WE'RE ALL IN THIS TOGETHER

CITY COUNCILORS IN JEFFERSON COUNTY ARE BUILDING TRUST ONE CITY AT A TIME

For the last six years, the Community Foundation has been a champion of regional cooperation. Without cooperation, many of the needs of our communities will go unmet. The Foundation believes that a more united region is a stronger region. The Greater Birmingham area consists of 35 different municipalities in Jefferson County alone, and for decades those cities have either operated in silos or competed with one another.

"With 35 independent municipalities in Jefferson County, there's no one that speaks for our region," says Christopher Nanni, President and CEO of the Community Foundation. "Fragmentation tends to breed competition at the expense of cooperation and perpetuates an ideology of scarcity when one of abundance is most needed."

In 2017, the Community Foundation released *Together We Prosper*, a report that explored and identified opportunities for regional cooperation. Over the next few years, the Foundation worked closely with the Jefferson County Mayors Association (JCMA) to convene a series of 'deep dives', meetings that gave the mayors an opportunity to explore areas for cooperation and build trust among municipalities.

One of the early successes of this cooperation was the Good Neighbor Pledge, an agreement among the mayors to combat business poaching between cities and to pursue long-term economic growth for the region. As Jefferson County Commissioner, Steve Ammons recently stated, "This agreement was the catalyst for much of the regional cooperation we see today."

That is why the Community Foundation was eager to support a group of Jefferson County City Councilors who were looking for opportunities to work together. In 2019, city councilors from Hoover, Birmingham, Mountain Brook, Bessemer, Vestavia Hills and Homewood started



Photo: Casey Middlebrooks, Hoover City Council, Jennifer Andress, Homewood City Council and Jesse Matthews, Bessemer City Council

meeting monthly – at first just to get to know one another, and later to discuss issues such as recycling, teen vaping, and Census participation. The pandemic moved the meetings to Zoom, but that didn’t slow down the group’s efforts. In fact, the councilors were communicating nearly every day as they all traversed tumultuous times.

“One of the biggest benefits I’ve received from the group is being able to communicate with councilors,” says Hoover City Councilor Casey Middlebrooks. “It’s helped me to tackle some issues that we may be dealing with in Hoover that other councilors from other municipalities may have already dealt with. We can share ideas.”

Middlebrooks helped start the group after he was inspired by a similar collaborative effort among Jefferson County mayors. The Jefferson County Mayors Association is a network of all the mayors of the county’s municipalities. One of the group’s most noteworthy accomplishments was the adoption of the Good Neighbor Pledge, an agreement among the mayors not to pilfer businesses from one another that was facilitated by the Community Foundation.

At the suggestion of Jefferson County Commissioner Steve Ammons, the group began working with the Community Foundation to create a formal organization – the Jefferson County Councilor Coalition (JC3).

This fall, the Community Foundation facilitated a deep dive for JC3 to discuss the various issues affecting our region. They identified two main goals for 2022 – trail expansion and public transit growth. The group wants to focus on the buildout of the Red Rock Trail System, a network of trails, parks, bike lanes, and sidewalks in Jefferson County.

“I’m a huge quality of life advocate and a huge believer in ‘If you build it, they will come,’” Homewood City Councilor Jennifer Andress says. “We all feel like trails bring people to the area.”

The group also advocates for growing the region’s microtransit options as well as changes to Alabama’s model for funding transit.

“The timing and urgency of this issue are extremely important in 2022 because of The World Games, and the need to move large numbers of people across the region expeditiously,” Andress says.

Alabama is one of only four states in the country that doesn’t offer state funds for public transportation. But JC3 hopes to change this by working together.

“If only Hoover or only the city of Birmingham was advocating for funding transit at a state level it may not have as much of a voice as all municipalities in Jefferson County supporting this,” says Middlebrooks, who is president of the Jefferson County City Councilors Coalition. “But there’s power in numbers.”

Jesse Matthews has served on the Bessemer City Council for more than 23 years, and his experience has taught him that cooperation — or lack thereof — can make or break a region.

“It drives businesses away from the region when there’s a lot of separation,” Matthews says. But when municipalities come together, he says, “It’s good for housing, it’s good for education, and it’s good for job growth.”

It’s true that metro areas with structures in place that promote cooperation tend to have more job growth, more population growth, more labor force participation, a higher median household income, and a lower poverty rate.

“But we can only move at the speed of trust,” Nanni says. That’s why groups such as the Mayors Association and the Jefferson County City Councilors Coalition are essential. With each deep dive, elected officials have deepened their trust, been willing to explore entrenched issues and, as a result, address bigger challenges. These groups aren’t only tackling issues, they’re building relationships.

“Each step forward increases trust,” Andress says. “And trust will propel our region forward.”

Photo: In 2021, the Community Foundation made a Regional Cooperation grant to support Red Mountain Park, Ruffner Mountain, and Turkey Creek Nature Preserve in their efforts to secure county-wide funding to support parks and green spaces.



BUILDING CAPACITY IN THE COMMUNITY:

Strategic Initiatives

At the Community Foundation, we realize that our responsive grant funding alone can't address our community's complex challenges. That is why our strategic initiatives focus on building capacity for transformational change in our community. Guided by our deep knowledge of the community, we fund, lead, convene and collaborate to address critical needs in our region. Our strategic initiatives include a focus on mental health, regional cooperation, inclusive economic growth, transportation challenges and eradicating child poverty.

MENTAL HEALTH

According to the CDC, Alabama has higher rates of suicide and poor mental health than the nation as a whole. Recent community health assessments show that mental health consistently ranks among the top public health priorities in our region. In 2015, recognizing mental health as a crisis-level issue, we made a commitment to play a leadership role in this space. Our work since then has focused on two areas: building comprehensive school mental health systems and implementing an integrated care model linking mental health and primary care in local clinics.

By 2020, working with the Health Action Partnership, we had engaged five local school districts in our efforts to address student mental health needs through enhanced training, assessment and mental health services. While the pandemic disrupted these efforts, we have worked with the school systems to pivot and provide services to their students through a variety of resources. In addition, we are continuing to focus on long-term structural changes locally and statewide to improve support for children's mental health.

Our collaboration with St. Vincent's Health Care System to build a self-sustaining mental health/primary care model has been challenging, due to limits on insurance coverage for mental health care in Alabama. But a series of grants for assistance in troubleshooting these issues have produced results. We are beginning to see success in addressing insurance reimbursement structures and implementing sustainability strategies with a goal of improved mental health outcomes and lower average health care costs.



"The funding from the Community Foundation and the expertise and guidance from people like Robin helped us secure this much needed resource for our region."

- Jim Crego, Executive Director of the JBS Mental Health Authority

2021 saw an exciting new opportunity for our work around mental health. With the support of several local funders, we brought on Robin Sparks as our part-time Mental Health initiative Director. Robin has an extensive background in the field through her leadership work with the Anne B. LaRussa Foundation of Hope.

This past year, Robin has been working with mental health partners to assess evolving mental health needs in the community and new areas for collaborative action.

In a major win for the region, Robin worked with the Jefferson-Blount-Shelby (JBS) Mental Health

Authority and other partners to spearhead the effort to bring a Mental Health Crisis Diversion Center, along with \$7 million in state funding, to Birmingham.

Jim Crego, Executive Director of the JBS Mental Health Authority credits the win to the support of the Community Foundation and other local partners. The Foundation committed a \$50,000 matching grant for the center and assisted with efforts to support the Mental Health Authority's application to locate it Birmingham.

"It was critical to show that there was local interest and support for the Crisis Care Center here in



Photo: Region II Crisis Care Center, 401 Beacon Parkway West, Birmingham, AL 35209

Birmingham," says Crego. "The funding from the Community Foundation and the expertise and guidance from people like Robin helped us secure this much needed resource for our region."

The Crisis Care Center is scheduled to open in the fall of 2022 and will operate as a 24-hour mental health emergency room staffed

with specialists. It will support individuals experiencing a psychiatric, behavioral and/or substance use crisis. By providing these services, the Center will be a resource for emergency first responders, free up space in emergency departments and provide immediate care and continued support for those individuals in need.

Inclusive Economic Growth

BIG IMPACT ON SMALL BUSINESS

CATALYTIC GRANT PROVIDES INNOVATIVE SUPPORT TO HELP SMALL BUSINESSES GROW

For Zhaundra Jones, building business and cultivating community go hand in hand. This was instilled in her as a child as she grew up with a father and grandmother who were entrepreneurs and a mother who worked in community development for the City of Birmingham.

That’s why as a Senior Program Officer at the Community Foundation, one of her top priorities is helping businesses in our region thrive. Jones sees investing in entrepreneurship as a way to offer people opportunity and freedom.

“I’ve always seen business as a tool for upward mobility,” she says. As Birmingham entrepreneurs move forward, so will their communities.

In 2021, the Community Foundation awarded its largest single funding commitment ever – \$1.5M for the Small Business Impact Grant Program, made possible by the Catalyst Funds. The funds were awarded to six Community Development Finance Institutions (CDFIs) and other community-based lenders in the region.

“I’m excited about all of them because they’re all different and they’re all filling a gap,” Jones says of the grant recipients, which includes Urban Impact Birmingham, a community and economic development agency committed to the revitalization of Birmingham’s Historic 4th Avenue Business District and Civil Rights District.

“The grant from the Community Foundation has accelerated our ability to launch our IMPACT microloan fund program and begin to deploy low-interest loans,” says Urban Impact’s Executive Director, Ivan Holloway. “Thanks to that investment, we are already beginning to offer capital to small, underserved businesses in the area.”

"The grant from the Community Foundation has accelerated our ability to launch our IMPACT microloan fund program and begin to deploy low-interest loans."

- Ivan Holloway, Urban Impact Executive Director

With the help of the \$110,000 Small Business Impact Grant, in addition to support from other funders, Urban Impact will offer loans ranging from \$500 to \$25,000 to help small businesses in Birmingham. The program opened in November, and already more than 100 businesses have completed interest forms.

The Foundation believes that with this infusion of resources and support to underserved businesses, entrepreneurs in our region will be better positioned to grow and flourish and to make the dream of economic opportunity for all a reality.

CATALYST FUNDS

Catalyst Funds were established in 2009 to celebrate the Community Foundation’s 50th Anniversary. Supported by a donor group of 55 families who shared a vision that their pooled gifts could bring about transformational change, the funds have invested more than \$4 million in large-scale community projects. These include the Small Business Impact Grants; the Birmingham Lights art installations that connect the city’s north and south sides; the Together We Prosper study and the Foundation’s resulting work on regional cooperation; Birmingham On-Demand microtransit pilot; and Innovate Birmingham.

Inclusive Economic Growth



2021 Highlights



In 2021, we received more than \$30 million in gifts and bequests and opened 36 new funds. In partnership with our donor directed funds, we distributed more than \$23 million in grants to the community.

Continuing Response To the Pandemic: With the pandemic not yet behind us, in January we surveyed our nonprofit partners to understand what challenges they were continuing to face. While many organizations were regaining their footing, others – especially small nonprofits and those led by people of color – were still struggling. In response, we simplified our competitive grants process and provided ongoing COVID relief funding.

Community Grantmaking: When we launched our Spring 2021 Grant Cycle in January, we returned to our five priorities. Through our two competitive grant cycles in 2021 we awarded \$2,801,000 to 106 organizations.

Generous Donors: 2021 was a landmark year for new gifts. We received more than \$30 million in gifts and bequests and opened 36 new funds. In partnership with our donor directed funds, we distributed more than \$23 million in grants to the community.

Learning Opportunities: 2021 was the third year of Woven Together, our learning series that brings a variety of speakers and topics to the community to address challenges and spark ideas for transformation. Topics for the year ranged from the COVID vaccine to a discussion around the role of business and philanthropy in addressing economic inequality in our region.

Equity and Inclusion In Our Work: In 2018, we spent the year listening to a broad range of community members to set our priorities for the next 10 years. Equity and inclusion was identified as a central issue. We have committed to deepening our knowledge in this area and integrating it into our work. In the spring, we held two RFPs focused on Equity and Inclusion and granted more than \$420,000 to 21 organizations, including a partnership with the Instruments of Hope Unity Fund. In addition, staff and board members participated in trainings focusing on internal operations and how this relates to our community engagement.

Field of Interest Funds: Our Field of Interest Funds had an outstanding year. The LGBTQ Fund and the Remy Fund for Pets and Animals have both reached \$1 Million in total assets and in 2021 granted out almost \$100,000 to the community in their areas of focus.

Leadership: We work every day to bring people, partners and organizations together to leverage our collective power for good. In 2021, we were able to bring our knowledge and expertise to address issues including transportation, regional cooperation, mental health, education and inclusive economic growth.

Largest Grant To Date: Our Catalyst Funds provided the leadership and funding for the \$1.5M Small Business Impact Grant program, the largest single funding commitment ever made by the Community Foundation. The funds were awarded to six community based lenders in the region to increase their ability to provide flexible capital and technical assistance to underserved small businesses.

How to Give

YOU CAN MAKE A DIFFERENCE IN OUR COMMUNITY AND BEYOND

Since 1959, generous donors in the Greater Birmingham area have worked with the Community Foundation to amplify their giving. We work with donors and their advisors to meet their specific interests and objectives through a variety of fund types. Working together we can help transform your giving passions into lasting, meaningful impact.

DONOR ADVISED FUND

Donor advised funds are simple to set up and easy to operate. They allow you to address a wide variety of issues and fulfill your charitable interests as they evolve over time. The flexibility of the donor advised fund makes it a convenient option to manage your giving and enjoy hands-on involvement.

CORPORATE FUND

Businesses large and small can use innovative charitable tools like donor advised funds to meet their charitable goals. A fund at the Community Foundation offers tax advantages and eliminates the record keeping and administrative hassles of a private foundation. In addition, you have access to the guidance of our professional staff and our deep knowledge of community issues and effective local nonprofits so you can align your company's philanthropic programs with your overall mission.

COMMUNITY IMPACT FUND

Our Community Impact Fund is a permanent fund that provides grant funding to nonprofits throughout our five-county region. You can contribute directly to the Fund and pool your charitable resources with

other donors to fund strategic grantmaking and special initiatives targeted to meet our community's most pressing needs.

FIELD OF INTEREST FUND

Many donors have a specific area of philanthropic interest they want to support. A Field of Interest Fund allows you to designate resources to address an issue that is important to you, like education or the arts.

LEGACY FUND

Legacy funds support the causes you care about for generations to come. By designating charitable contributions through your estate plan, the assets you protected during your lifetime become available to leave a lasting legacy in the community.

Interested in exploring options for your personal giving?
Call us at 205.327.3808 or visit cfbham.org/giving.



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