KEY FACTS AND FIGURES

**Total Assets**
$299.7 Million

**Grants made in 2021**
$23.3 Million

**New gifts in 2021**
$30.1 Million

**Number of Grantmaking funds**
557

**Minimum fund size**
- $15,000 most funds
- $50,000 Catalyst fund
- $200,000 Scholarship fund

**Average fund size**
$471,310

**Largest fund**
$20.9 Million

**Community grants Since 1959**
$527 Million

**Year founded**
1959

**Counties served**
Blount, Jefferson, St. Clair, Shelby and Walker counties

As of 12/31/21 (unaudited)

ABOUT THE COMMUNITY FOUNDATION

**OUR VISION**
A just, prosperous and unified region where every person is empowered to reach their full potential.

**OUR MISSION**
To ignite passion for transformational change.

**OUR CORE VALUES**
Lead | Inspire | Innovate | Include

**HISTORY**
Our Community Foundation was founded in 1959 by a group of generous, dedicated leaders as a public endowment to support enduring change and success for the community. Although the issues facing our community have changed over the past six decades, our commitment to supporting our region remains steadfast. We continue to galvanize the passion of philanthropists, nonprofits and leaders to empower communities, create opportunity, grow capacity and build charitable resources for a brighter future for a Greater Birmingham.

**TYPES OF FUNDS**

**COMMUNITY CATALYST FUNDS:** Philanthropic venture funds that allow the Community Foundation and its donors to make transformational investments that benefit the greater Birmingham community.

**DESIGNATED:** Donors can choose to create a long-term charitable resource to benefit one or more nonprofits.

**DONOR ADVISED:** These funds allow individuals, families and businesses to be part of the work of the Community Foundation, while also supporting their favorite charities and organizations. Donor Advised Funds are like having a private foundation, but with greater tax advantages and fewer administrative burdens.

**FIELD OF INTEREST:** Many donors have a specific area of philanthropic interest they want to support; a Field of Interest Fund allows them to do this without having to specify any particular organization.

**AGENCY ENDOWMENTS:** These funds allow individual nonprofit organizations to start and build an endowment, using the professional services of the Community Foundation.
GRANTMAKING FUNDS BY ASSET TYPE

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>DONOR ADVISED</td>
<td>20%</td>
</tr>
<tr>
<td>FLEXIBLE (COMMUNITY, FIELD OF INTEREST, CATALYST)</td>
<td>53%</td>
</tr>
<tr>
<td>OTHER (AGENCY, DESIGNATED, SCHOLARSHIP)</td>
<td>27%</td>
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</tbody>
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GRANTS AND INITIATIVES

GRANTS: The grants we make to nonprofits in the Birmingham region come from the Community and Field of Interest Funds. In 2021, the Foundation launched our new grantmaking framework focusing on five priorities identified by the community:

- Creating Economic Opportunity for All
  21 grants totaling $722,000
- Overcoming Persistent Poverty
  13 grants totaling $352,000
- Nurturing Thriving Communities
  35 grants totaling $891,000
- Driving Regional Cooperation
  4 grants totaling $97,000
- Fostering Equity and Inclusion
  33 grants totaling $739,000

In addition to the Foundation’s competitive grants process, in 2021, donors designated more than $15 million through their donor advised funds to support causes they are passionate about including education, community and economic development, faith organizations, social services and arts and culture.

PROACTIVE INITIATIVES: To maximize our positive impact on the region, the Community Foundation develops and implements largescale, multi-year regional initiatives. Working with donors, nonprofit organizations, and local leaders, we identify key concerns and develop initiatives to address those concerns and accelerate opportunities within the area.

Current initiatives include: Inclusive Economic Opportunity, Greater Birmingham Community of Hope (focused on supporting and strengthening families and communities), Regional Cooperation, Mental Health, Microtransit and Summer Learning Loss.