

Your Philanthropy Experience

Introduction – The First Meeting

- Why partner with Community Foundation Tampa Bay?
- Strong leadership on community solutions using the collective impact model.
- Our team is here to facilitate your joy of giving and connect you to the causes you care about.
- We strive to make your philanthropic experience easy and meaningful.

Selecting a Fund That's Right for You

- Define the purpose of your fund – reflective of your values and interests.
- Name your fund: create *your* legacy.
- Structure your fund to make the impact you envision.

Welcome & Orientation

- Introduction to your Community Foundation team: your expert philanthropic counsel.
- Community updates: annual report, newsletters and special community reports.
- Experience the joy of giving, knowing we handle administrative detail.
- We handle compliance with the ever-changing IRS regulations and best practices.
- Facilitate a discussion about your values and interests with our Giving Guide.

Grantmaking with Impact

- Due diligence of nonprofit programs.
- Error-free and timely processing of grants.
- Know you are making an impact through reports and success stories.

Educational Opportunities and Special Invitations

- Learn about causes and organizations through educational events and meetings.
- Network with like-minded philanthropists at social events.
- Access a community needs list to view local nonprofit funding opportunities.
- Keep up-to-date with local nonprofit initiatives at our annual Sneak Peek of competitive grant applications, exclusive for fundholders.

Ongoing Evaluation of Your Philanthropy Experience

- Is your philanthropy joyful and fun?
- Do you feel connected, know that you are making a difference and have peace of mind?
- Is your giving strategic and focused in order to achieve the impact you envision?
- Know that your assigned philanthropic expert is available to assist you any time of the year.



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