



Fund Advisor Briefing

LIVE WEBCAST WILL BEGIN SHORTLY



FUND ADVISOR BRIEFING

COMMUNITY FOUNDATION OF TOMPKINS COUNTY

Mission Aligned Investments, Strategies and Impact

Welcome

George Ferrari, Chief Executive Officer, Community Foundation

Mary MacAusland, Treasurer, Financial Administration Committee

and Board Member, Community Foundation

ESG Investments

Amy Seto, CPA, Endowments & Foundations Senior Advisor, Brown Advisory

James Stierhoff, Portfolio Manager, Brown Advisory

Q & A

Strategies and Impact

George Ferrari, Chief Executive Officer



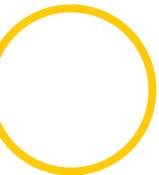
FUND ADVISOR BRIEFING

Mission Aligned Investments, Strategies and Impact

Mary MacAusland

Board Treasurer & Financial Administration Committee Chair

Community Foundation of Tompkins County





FUND ADVISOR BRIEFING

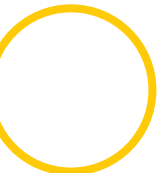
Mission Aligned Investments, Strategies and Impact

George Ferrari

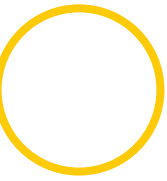
Chief Executive Officer



Community Foundation of Tompkins County



DIGGING DEEPER AND ADJUSTING OUR LENS



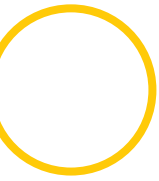


COMMUNITY FOUNDATION OF TOMPKINS COUNTY FUND ADVISOR BRIEFING WITH BROWN ADVISORY

Mission Aligned Investments, Strategies and Impact



QUESTIONS & ANSWERS



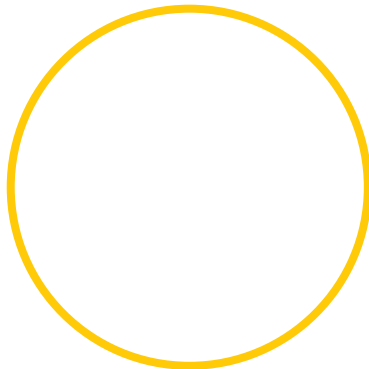


MISSION ALIGNED INVESTMENTS, STRATEGIES AND IMPACT

Increased endowed funds spendable rate to 5%

Re-allocated \$5.6 million of assets into our ESG/SRI pool

Increased 300% in operational spending for diversity, equity, inclusion and justice improvements



YEAR 2020 BY THE NUMBERS FOR COMMUNITY FOUNDATION OF TOMPKINS COUNTY



\$3+ M RAISED

Individuals, businesses, philanthropic institutions and local government came together to support our community, responsive to immediate needs and investing in our future



1,325 GIFTS

Gifts ranging in amount from \$3 to \$500,000



1 in 3 gifts went into COVID-19 Response Fund



\$25.2 M

Assets held at Community Foundation

140 Funds

\$2.3 M

Grants deployed through grant cycles, designated and donor advisor directed funds



572

Number of grants



229

Number of unique grantees



\$326,000

Arts & Culture



\$757,000

Community Building



\$129,000

Education



\$83,000

Environment Sustainability



\$1,027,000

Health & Human Services

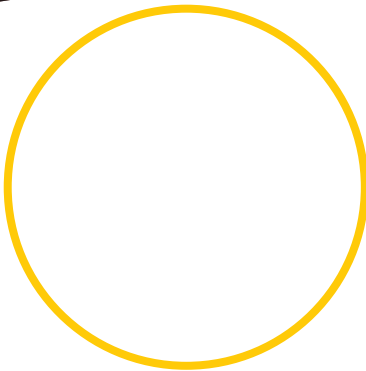


OUR NEXT ACTION STEPS

In our planning, how can we step up and ***align our resources*** with our values and goals?

What is our ***impact***?

Who are we doing this work alongside, and how are we encouraging others to ***develop their visions*** of change?





MISSION ALIGNED INVESTMENTS, STRATEGIES AND IMPACT

Questions, Set an appointment, Talk over the phone

Community Foundation of Tompkins County Staff:

Janet Cotraccia, Chief Impact Officer, jcotraccia@cftompkins.org

George Ferrari, Chief Executive Officer, gferrari@cftompkins.org

Jessie Galbreath-Nocera, Administrative Coordinator, admin@cftompkins.org

Amy LeViere, Chief Philanthropic Services Officer, aleviere@cftompkins.org

Nancy Massicci, Chief Development Officer, nmassicci@cftompkins.org

Thank you for your role, inspiring and supporting enduring philanthropy.

Recording and slides will be made available

