The Year in Review
SECF’s Annual Report

Telling Stories Through Research & Data
SECF partnered with MDC to produce the landmark report, Philanthropy as the South’s “Passing Gear”: Fulfilling the Promise. This new study looks at the progress the region has made in the last decade, challenges that persist and the innovative solutions grantmakers have pursued to address them. SECF also continued to add detail to the full picture of Southern giving through the 2017 update to the Southern Trends Report.

A Strong Voice for Our Sector
Knowing that tax reform legislation could significantly affect charitable giving, SECF quickly mobilized in response, sending the largest delegation in the country to Foundations on the Hill. Our presence in Washington was also greatly enhanced through a partnership with Urban Swirski & Associates, a Washington advocacy firm specializing in the charitable sector. Before legislation was officially unveiled, SECF members acted quickly to adopt a set of positions on tax reform that will guide our advocacy in the weeks and months ahead.

New & Improved Publications
SECF’s two signature publications – its weekly e-newsletter and quarterly magazine – were given a top-to-bottom refresh in early 2017. The newsletter, Connect, brought with it a mobile-friendly design and a greater emphasis on content provided by SECF members. Our magazine, now known as Inspiration, is focused on telling rich stories based on collaboration, trends and best practices. SECF’s new blog, Engage, has featured dozens of posts from members and partners providing first-person perspectives on their work and experiences in grantmaking.

Leveraging Partnerships for Powerful Programs
Going beyond our lineup of core programs, SECF also worked closely with partners this year to provide valuable opportunities to all kinds of grantmakers and giving programs. Success stories include the Community Foundation Boot Camp, held in partnership with the Florida Philanthropic Network and featuring a faculty and curriculum from the Indiana Philanthropy Alliance, the Corporate Social Responsibility Workshop, presented in partnership with ACCP, and the Grantee Inclusion Workshop, produced by SECF and Grantmakers for Effective Organizations.

Expanded Regional Outreach
With the philanthropic landscape constantly changing, SECF has worked to ensure its work encompasses the full spectrum of Southern giving. This year, we welcomed our first philanthropic individuals as members and are poised to add more going forward. SECF also brought together state and local grantmaker associations for a first-of-its-kind convening in August, creating more opportunities for connection and collaboration.
### Leadership Development

- **Number of participants in SECF leadership development programs**
  - **2015:** 45
  - **2016:** 51

### Member Engagement

- **Organizations attending one or more programs**
  - **2015:** 75%
  - **2016:** 74%
- **Trustees attending SECF programs**
  - **2015:** 271
  - **2016:** 266
- **CEOs attending one or more programs**
  - **2015:** 55%
  - **2016:** 56%

### Public Policy

- **Members participating in Foundations on the Hill**
  - **2015:** 38
  - **2016:** 37

### Financial

<table>
<thead>
<tr>
<th></th>
<th>YE 2015</th>
<th>YE 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dues Revenue:</strong> (Goal: ≥ 50%)</td>
<td>$1,924,348</td>
<td>$2,089,208</td>
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<tr>
<td><strong>Total Assets:</strong></td>
<td>$2,326,987</td>
<td>$2,527,109</td>
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<tr>
<td><strong>Total Revenue or Other Support:</strong></td>
<td>$2,275,950</td>
<td>$2,385,672</td>
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<tr>
<td><strong>Total Expenses:</strong></td>
<td>$1,483,705</td>
<td>$1,534,742</td>
</tr>
<tr>
<td><strong>Total Net Assets, Beginning:</strong></td>
<td>$1,483,705</td>
<td>$1,534,742</td>
</tr>
<tr>
<td><strong>Total Net Assets, Ending:</strong></td>
<td>$1,534,742</td>
<td>$1,676,179</td>
</tr>
</tbody>
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*Goal: 365 by YE 2020*

*Goal: 95% annually*

*Goal: 75% annually*

*Goal: 60% annually*