

Community Foundation Regional Gathering, July 18, 2017

Hosted by ChesCo CF at Hirtle Callaghan & Co.

What's New?

- Pedro @Philadelphia Foundation
 - “On the Table” – CCCF participated in it
 - Almost 300 people around the neighborhood hosted dinners and lunches to discuss the community
 - Still gathering information to partake in the event again in the future
 - “PA is Ready”
 - State-wide effort to support state organizations
 - Immigrants and refugees to get legal access to education and such

- Charles and Diane @Luzerne Foundation
 - \$37 million in size (\$17 million in grants)
 - Faith-based projects
 - Modified their grant-making strategy and still working on it
 - Working on making bigger grants
 - Big change for them
 - Large component: Scholarships
 - 103 candidates
 - Most of the staff attend the ceremonies in all different places (between the 2 of them)
 - 5-7 at a time, then leave
 - “It’s nice to get a touch of where the money is going and wishing them good luck”
 - Don’t get the scholarship until they graduate
 - “YAC” – Youth Advisory Committee

- Jason @Berks County Community Foundation
 - YAC Program
 - Every year gives out \$15,000 in grants
 - Program in Harrisburg coming soon
 - Announcing the results of a report in municipalities around the state
 - August will be hearing from them
 - “Berks Vital Signs” – data and statistics indicator on their website

- Laura @Scranton Area Community Foundation
 - 4 issues
 - Initiative to look at public transportation on an equity perspective is impacting the community on health care and such
 - “Equitable” transit summit
 - Leverage resources, understand assets, etc...
 - Women in Philanthropy
 - Hunger/need to leverage the female donor population
 - Prioritize with constituents to help women feel more financially confident
 - Advancing stamina
 - Challenges of oral health
 - Medallion Partners Program

- Bring other advisors and donors into the picture
 - Offer new types of charitable funds
 - Charitable gift annuities (CGA's)
 1. Advisors want to be able to offer to their donors
 2. Different policies attached with CGA's
 3. Delaware – Budget line
 - Becoming an asset to the Community in Management Agreements and such

- Bernie, Erika, Mike & Trish @ Lehigh Valley
 - New staff
 - Strategic Planning Process
 - Restructuring the size and culture of their board
 - Fewer committees and more strategic support
 - Major change in their grant-making
 - 50th anniversary year (year-long event)
 - Every other month, they give grants out to 5 finalists who are chosen to compete for grants through a series of videos they do (6 different issues)
 - Narrowed down from 30-40 issues
 - Public votes on it: social media
 1. 60,000 votes
 2. 100,000 views of videos of each issue which narrowed it down to the 6 issues
 3. Certain number of votes a day
 - Prioritized based on where they want to be as a community foundation
 - “Be the Spark” Campaign
 1. Mental behavioral access
 2. Cultural enrichment
 3. Food and housing access
 4. Environment sustainability
 5. Human trafficking
 6. Veterans affairs
 - \$50,000 in total for grants given out
 - Added 6 new cycles of grant-making as a result of it
 - Awareness building
 - Opportunity for others to join the effort
 - Fellowship
 - Donor-funded
 - Dr. Chris Bork
 - Grant-Management System

- Meg Fallin Dietrich @Summit Area Foundation
 - 50th year anniversary
 - \$16 million
 - Going through a strategic planning process
 - Fiduciary
 - “Best kept secret”
 - Looking to grow restricted funds

- Jeff @Princeton CF

- 80% of staff present:
 - Chief Financial Officer
 - Director of Communication
 - Grants & Community Manager
 - Scholarship Manager/Receptionist/Donor-Engagement
 - Accountant (Controller)
 - Director of Donor Services
 - VP for Development Programs
 - VP of Grants & Development
 - VP for Development
 - Revamped annual appeal process
 - Recreated as a year-long process
 - Lapsed contributors
 - Predecessor achieved the highest level of annual assets growth; then surpassed that in the past 2 years; on a roll
 - Now over \$100 million
 - New grant guidelines (from responsive to a more strategic approach)
 - Looking for more collaboration with other foundations and community
 - How to continue visibility and communicate who they are
- Jodie @Montgomery County Foundation
 - Much more active with community work
 - Literacy in Academic Universities
 - Women in MonCo
 - Roundtable sessions
 - Monthly workshops to work on all of these “pieces” foundations are working towards accomplishing
 - Collective decision making on a larger basis
 - Elise @ York County Community Foundation
 - \$135 million assets
 - Partnering with funders
 - Communities and schools (United Way)
 - Helping students be more successful
 - 5 programs at schools
 - Gun violence prevention initiative
 - People tied to incidents
 - Modeled after Boston program
 - Identifying potential offenders
 - Finding stable housing to get folks out of these conditions
 - \$57,000 a year
 - Crime is down a certain percentage
 - Park improvement
 - Housing projects
 - Community and advocacy
 - Document progress and such
 - Municipality challenges
 - Aging initiative
 - Age-friendly environment
 - Storm water authority

- “York counts” indicator projects
 - Taking a lot of data and displaying it on the website
 - How they compare to PA
 - Invested in donor central for technology upgrades
 - Grant software
 - “Found it”
- Stuart @Delaware Community Foundation
 - Reviewing various foundations for best practices
 - A dozen major internal operational changes within past year, including
 - Scholarship software
 - Online access for donors
 - 1300 funds
 - Lots of agency funds (\$10,000 funds)
 - “Delaware Focus” – Oct. 2015
 - Indicators dashboard
 - “Flying a drone over the state” and zooming in on what needs help
 - What’s going well, what’s going poorly, etc...
 1. Issue: Diversity in community
 - 2.
- Betsy @Frederick, MD
 - Making it easier for grantees to apply for grants
 - Needs assessment a few years ago
 - Quantitative and qualitative data
 - Donor surveys
 - Using this information to help progress in 3 community issues:
 1. School readiness
 2. Access to health care
 3. Housing
 - Launching donor access software
 - Where donors can access their own funds on the website
 - Active in community leadership roles
 - Wanted to bring donor side to the 3 issues
 - “Unrestricted Giving Campaign”
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Mike @ Jewish Community Fdn Southern NJ

- Collaborate with Jewish Orgs
- Event-driven
- Working on collaborating with other organizations/foundations
- “Best kept secret”
- Scholarships
- Working with advisors & expanding what they’re doing
- Scott @SW Initiative, Minnesota
 - 18-county community foundation
 - w/McKnight Foundation
 - 6 independent foundations
 - Direct business loans and equity investments
 - Business retention/expansion

- Manufacturing plants
 - Small businesses
 - Ethnic grocery stores
 - Hotels
 - Migrant workers who want to grow wealth
 - Biggest economic issue in area: childcare availability
 - “Biggest challenge on their radar”
 - Workers leaving the workforce
 - Community banks
 - Good source of growth and development
 - Work in outreach with community banks
- Erica @ Lower Eastern Shore, MD
 - Heavily rebranding
 - \$110 million in assets
 - Lower 3 shores (Ocean City, Assateague, x)
 - Just launched a new website
 - “Community Floors” Platform
 - “Giving Day”
 - Partnered with Civic NPOs
 - \$90,000 total
 - Focusing on workforce development, school readiness, etc...
 - Local junior achievement and university
 - “Well-kept secret”
 - Melissa @ Community Foundation of Anne Arundel County, MD
 - 19 years of the foundation
 - \$1.45 million in grants last year
 - Focused on increasing awareness and internal development
 - “Community Sweep”
 - Continue to manage estate planning council
 - 3-year strategic plan
 - Community leadership and partnerships
 - Speaker series (community impact)
 1. Partner with county and 2 major hospitals
 2. Awareness of the foundation and important county issues
 3. “We’re the umbrella, some other nonprofit takes the lead on the event”
 4. Presentations and conversations
 5. Topics (Community engagement in public schools, etc...)
 - Workshops with businesses and nonprofits (can’t promote their business)
 - Collaborative giving (arts & culture, and environment)
 - Molly @Center Foundation, State College
 - “Center Inspires”
 - Encourage partnerships between nonprofits
 - County-wide issues
 - Offer \$100,000 a year that can go towards one project
 - Encourage programs outside what they normally do
 - Within 18 months

- Engage with community
 - Applications each year
- Process to reup their standards
- “Giving Day”
 - Continues to grow; hugely successful
 - “best marketing the foundation has ever had”
 - New website (partnered with a company)
- Looking for professional advisory programs
- Working on nonprofit training
 - Social media
 - Online giving
 - Thanking donors
- “Center Pact”
 - Philanthropic actions by high school teams
 - Once a month they meet
 - Bringing donors to the foundation that may be harder to find
- Changing marketing program (survey)
 - People know who they are, but not what they do
 - Annual Report → “Annual Magazine”
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- Beth @Chester County Community Foundation
 - \$50+ million in assets; 350 funds; 23 yrs old
 - 220 scholarships & 500 grants annually
 - Strengthening relationships with professional advisors, fund advisor families
 - Medallion Partner program: Opportunities for investment managers to work with CCCF
 - Reaching out to next gen via Giving Circles
 - 80+ nonprofit endowment funds:
 - NP suite of services = training staff & board; peer groups; trustee institute; planned giving support services
 - Admin focus: dashboards, MOVES management tracking, etc to institutionally track activities & outcomes

Respectfully submitted by:

Dwayne Robinson

7/25/2017