



CF PROFILE SUMMARY:

COMMUNITY FOUNDATION REGIONAL GATHERING PA-NJ-DE-MD

Hirtle Callaghan, Conshohocken PA
Mon. 7.25.22

Materials, Attendance List, Initiative Area Listings:
<https://chescof.org/fund/community-foundations-regional-gathering/>

Dashboard View of Survey Results (n=16) as of 7/21/22 Online:
https://www.surveymonkey.com/stories/SM-GMWpHxMyH_2B2uhQLyh7a0KA_3D_3D/

To Fill Out Survey Online: <https://www.surveymonkey.com/r/CFPROFILE2022>



Alleghenies, CF	www.cfalleghenies.org
Adams CCF	www.adamscountycf.org
Anne Arundel Co, CF	www.cfaac.org
Berks CCF	www.bccf.org
Bucks Co Fdtn	www.buckscountyfoundation.org
Carbon County CF	www.cccfoundpa.org
Centre Fdtn	www.centre-foundation.org
Chester Co CF	www.chescocf.org
Comm Giving Fdtn	www.csgiving.org
Delaware CF	www.delcf.org
Fdtn for Delaware Co	www.delcofoundation.org
Lancaster Co CF	www.lancfound.org/
Lehigh Valley CF	www.lvcfoundation.org
Philadelphia Fdtn	www.philafound.org/
Princeton Area CF	www.pacf.org
South Jersey CF	www.communityfoundationsj.org
Washington Co CF	www.wccf.net
York County CF	www.yccf.org/

CF MISSION STATEMENTS

- We embolden extraordinary community

- To inspire and facilitate a culture of giving which creates a **vibrant** community.
- To create a **vibrant** county by engaging donors, providing community leadership, investing in high-impact initiatives while building endowment for future generations.
- To create a **vibrant** future by: promoting generosity in and for the people of our county, improving the well-being of our residents, and energizing participation and partnership across our communities.
- Achieving donors' intentions to enhance the **quality of life** in our region.
- To improve the **quality of life** for all residents, now and forever.
- We **inspire** generosity, manage and deploy permanent charitable assets, and exercise collaborative leadership to create a more equitable region.



- Promoting Philanthropy to advance the well-being of our communities forever.

- Promote philanthropy and improve the quality of life for the residents

- Promote philanthropy in order to improve the quality of life in our region, to encourage collaboration among area philanthropists, and to serve as a source of information and expertise regarding charitable giving.

- We empower everyone in our community to understand how their **philanthropy** can leave a lasting legacy in our region.

- Enhance the quality of life for residents by stimulating **philanthropic opportunity** and developing long-term financial assets to meet a wide range of the community's charitable needs

- Our mission: to inspire people and communities to build and distribute charitable funds for good, for ever. Our vision: The Community Foundation will be a key resource, promoting charitable giving among people of all means who wish to make lasting and meaningful contributions to this region, and working to strengthen our communities through collective **philanthropy**.

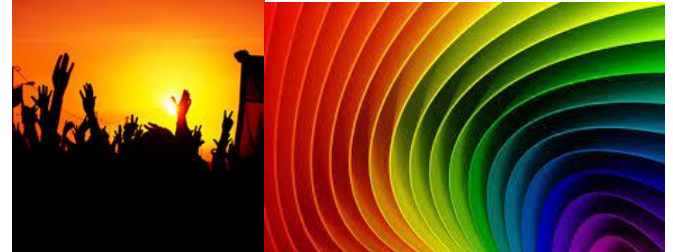
- Connect people who care with causes that matter, so their **philanthropy** makes a difference now and forever.

•For more than a century, we have increased **philanthropic investment** in the community, fostering the economic, civic and social vitality of the region. We take charitable dollars further through our deep relationships in the community, close connections with local nonprofits and 100-year history of building positive outcomes. **Born of a desire for more powerful, permanent funding to address community needs**, we collaborate with thousands of individuals, families and businesses to advance this goal, always with an eye on the future. As we enter our second century of service, our vision remains grounded in the needs of today and tomorrow and is shaped by the values we hold close, including excellence, diversity, equity and results. From Ben Franklin's civic gift of 1,000 pounds sterling to Gerry Lenfest's endowment for independent journalism, we **steward legacies** that strengthen the place we call home, **improving lives today and for future generations**.

What DISTINGUISHES Our CF from Others?

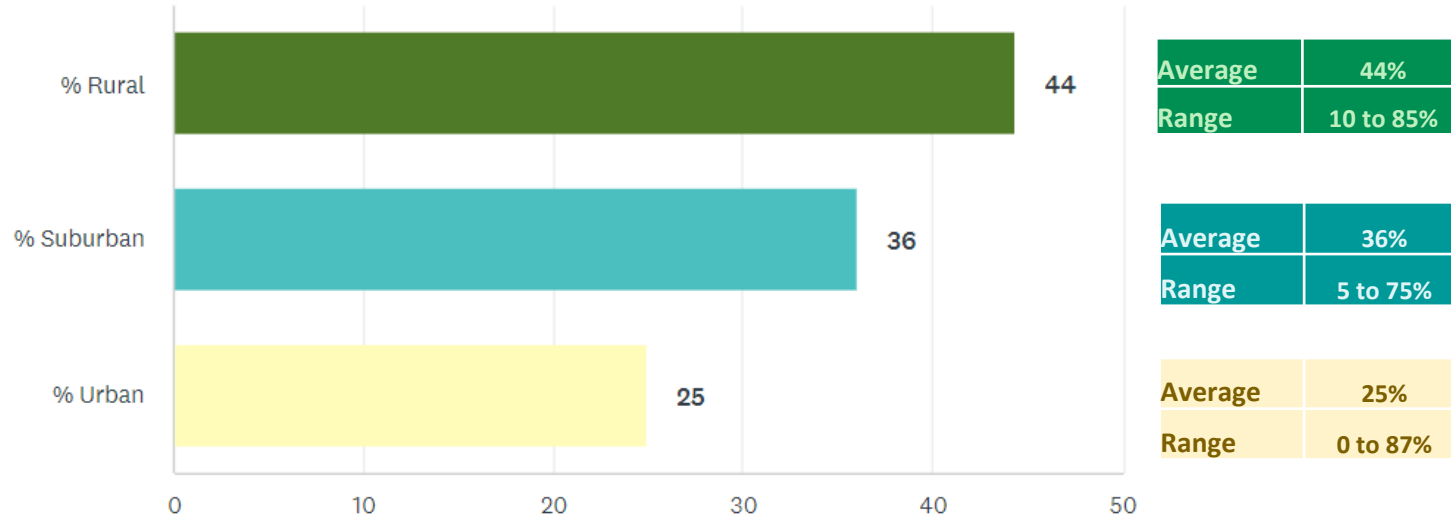
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- We were established by **community members**, not any sort of endowment. We are still at a place where we need to **fundraise for nearly all of our operating costs**.
- Our % of permanent, **discretionary assets** seems to be unusually high relative to many community foundations. We also carry a very low % of DAFs.
- **Self-sustaining** from fees. 100% endowed assets. Don't do a giving day. At **most leadership tables** in the community.
- Focus on **building unrestricted assets**. We make fewer, **larger discretionary grants**.
- We have really grown in the area of **charitable services administration**, which has allowed us to make meaningful grants for our local nonprofit partners, while cultivating potential future fund-holders.
- We have several robust discretionary grantmaking programs which award **capacity building grants**
- Nonprofit capacity building program
- 5 ½ county service area, **regional affiliate structure** (5 affiliates)
- **Visible turn to civic leadership**
- For many years, the majority of our funds derived from discretionary dollars providing **social venture capital** to drive unique community-building initiatives. We host **large-scale public events** like the Extraordinary Give, **catalyze community engagement** activities like At the Table, and **invest in community-wide research** like a New American Economy study on the impact of immigrants and refugees, and a PolicyLink-led **equity profile** for Lancaster County.
- Foundation for Delaware County, PA is distinct in three ways:
 - #1: A substantial portion of our assets are **unrestricted** so we have a strong grantmaking program for a CF that is only 5 years old.
 - #2: We run **public health programs** including WIC, NFP, Healthy Start, HOPE housing program; have a full-time sexuality educator in one of our public high schools.
So, we're raising money for our internal programs as well as from donors setting up funds with us.
 - #3: We are very active in the **convening and issue advocacy** space, particularly in partnering with our county government to establish a **new health department**.
- Legacy philanthropy **program development** to fill county-wide gaps, starting small and evolving organically, with an **eye on long, long term**
 - Ex #1: Inclusion, Diversity, Equity & Access IDEA Community Conversations
 - Ex #2: Services to NPOS: capacity building trainings & peer groups, NP planned giving endowment consulting & support; piloting GetOnBoard ChesCo
 - Ex #3: Culture Builds Community: evolving, again, as COVID normalizes & America 250 approaches/"Unfinished Business"



The DENSITY & CHARACTER of Our CF's Geographic Service Area is @

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#s OF PEOPLE INVOLVED: Our Community Foundation #'s:



Collective Nouns For People



A board of directors



A board of trustees



A board of chess players



A board of barristers



A body of men



A body of pathologists



A caravan of gypsies



A caravan of travelers



A cast of actors/players



A catalogue of librarians



A cavalcade of horsemen



A chapter of canons



A choir of singers



A circle of friends



A class of pupils



A class of students



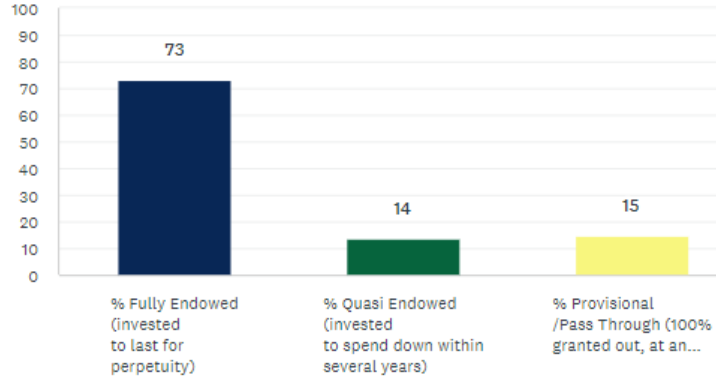
WHAT SIZE ARE WE? Our CF \$AUM, Gifts In, Grants Out, Operating \$:

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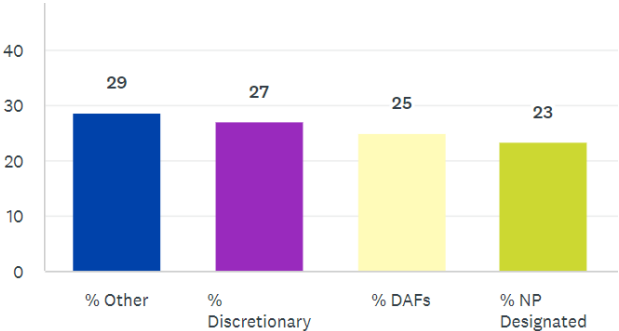
\$ Total AUM	\$ Annual Donations Rec'd	\$ Annual Grants & Scholarships Paid Out	\$ Annual Operating Budget	
				Bucks County Foundation
\$ 1,500,000	\$ 500,000	\$ 228,000	112,000	Carbon County Community Foundation
\$ 22,000,000	\$ 4,000,000	\$ 3,000,000	400,000	Adams County Community Foundation
\$ 54,000,000	\$ 13,000,000	\$ 3,200,000	500,000	Community Foundation of South Jersey
\$ 55,000,000	\$ 5,000,000	\$ 4,000,000	1,000,000	Washington County Community Foundation
\$ 74,000,000	\$ 1,857,673	\$ 4,000,000	1,000,000	Community Giving Foundation
\$ 75,000,000	\$ 6,800,000	\$ 1,500,000	9,000,000	Foundation for Delaware County
\$ 81,000,000	\$ 9,000,000	\$ 4,000,000	500,000	Centre Foundation
\$ 85,000,000	\$ 13,000,000	\$ 6,000,000	1,200,000	Lehigh Valley Community Foundation
\$ 90,000,000	\$ 12,000,000	\$ 5,000,000	1,000,000	Chester County Community Foundation
\$ 101,635,000	\$ 14,689,000	\$ 16,000,000	1,500,000	Community Foundation for the Alleghenies
\$ 150,000,000	\$ 30,000,000	\$ 3,600,000	2,000,000	Berks County Community Foundation
\$ 200,000,000			1,000,000	Lancaster County Community Foundation
\$ 210,000,000	\$ 10,000,000	\$ 7,000,000	2,000,000	York County Community Foundation
\$ 260,000,000	\$ 40,000,000	\$ 22,000,000	3,000,000	Princeton Area Community Foundation
\$ 802,000,000	\$ 158,000,000	\$ 78,000,000	5,000,000	Philadelphia Foundation
\$151,000,000	\$23,000,000	11,000,000	1,900,000	AVERAGE
\$ 2,261,135,000	\$ 317,846,673	\$ 157,528,000	\$ 29,212,000	TOTAL

HOW FAR ARE WE LOOKING AHEAD? The TIME HORIZON for Our CF's Entrusted Funds is @



% Fully-endowed (invested to last for perpetuity)	% Quasi-endowed (invested to spend down within several years)	% Provisional (100% granted out, at any time)	
			Bucks County Foundation
40	30	30	Carbon County Community Foundation
97	2	1	Adams County Community Foundation
10	65	25	Community Foundation of South Jersey
85	0	15	Washington County Community Foundation
95	0	5	Community Giving Foundation
94	0	6	Foundation for Delaware County
98	1	1	Centre Foundation
80	5	15	Lehigh Valley Community Foundation
67	21	12	Chester County Community Foundation
			Community Foundation for the Alleghenies
95	3	2	Berks County Community Foundation
60	34	6	Lancaster County Community Foundation
99	0	1	York County Community Foundation
25	0	75	Princeton Area Community Foundation
81	19	0	Philadelphia Foundation
73%	14%	15%	AVERAGE

WHO DO WE ANSWER TO? Our @Proportion of Entrusted FUNDS, by TYPE:

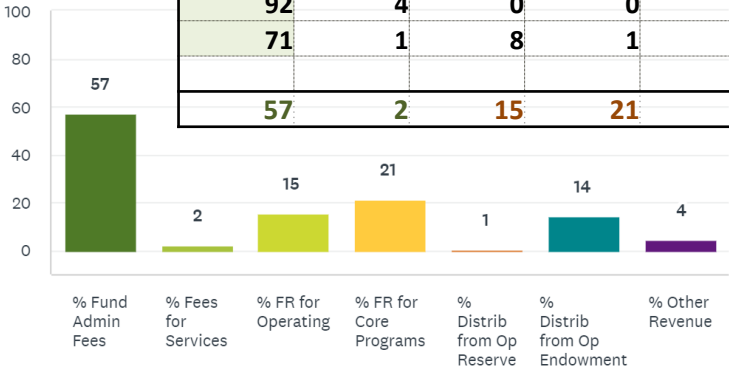


% Other Funds	% Discretionary Funds	% Donor Advised Funds	% NP Designated Funds	
				Bucks County Foundation
69	14	13	4	Carbon County Community Foundation
10	40	13	37	Adams County Community Foundation
				Community Foundation of South Jersey
28	15	37	20	Washington County Community Foundation
83	3	11	3	Community Giving Foundation
0	83	16	1	Foundation for Delaware County
14	6	7	73	Centre Foundation
7	20	28	45	Lehigh Valley Community Foundation
20	14	59	7	Chester County Community Foundation
55	6	17	22	Community Foundation for the Alleghenies
15	48	11	26	Berks County Community Foundation
16	30	50	4	Lancaster County Community Foundation
0	33	27	40	York County Community Foundation
6	19	45	30	Princeton Area Community Foundation
20	48	17	15	Philadelphia Foundation
29%	27%	25%	24%	AVERAGE

FINANCING/SUSTAINABILITY MODEL: Our CF's OPERATING Budget is @

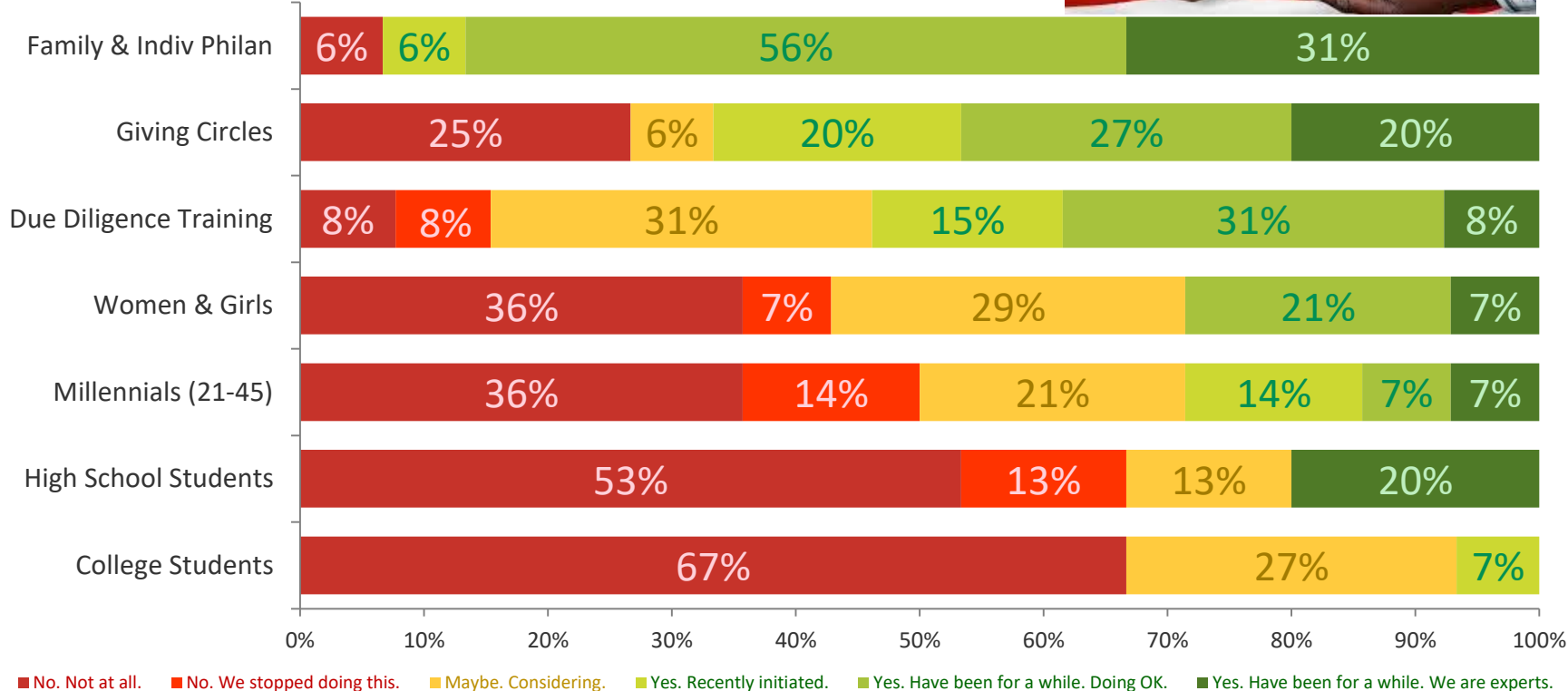
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% Fund Admin Fees	% Fees for Services	% FR for Operating	% FR & Govt Contracts for Core Programs	% Distrib from Op Reserve	% Distrib from Op Endowment	% Other Revenue	\$ Annual Operating Budget	
98	0	0	0	1	0	1		Bucks County Foundation
6	0	68	5	0	0	21	\$ 112,000	Carbon County Community Foundation
75	9	3	8	0	5	0	\$ 400,000	Adams County Community Foundation
20	0	50	30	0	0	0	\$ 500,000	Community Foundation of South Jersey
79	0	10	0	1	10	0	\$ 1,000,000	Washington County Community Foundation
97	0	0	0	0		3	\$ 1,000,000	Community Giving Foundation
1	0	3	67	0	29	0	\$ 9,000,000	Foundation for Delaware County
1	0	0	96	0	2	1	\$ 500,000	Centre Foundation
72	1	3	4	3	17	0	\$ 1,200,000	Lehigh Valley Community Foundation
83	0	9	0	0	10	-2	\$ 1,000,000	Chester County Community Foundation
							\$ 1,500,000	Community Foundation for the Alleghenies
80	9	0	0	0	0	11	\$ 2,000,000	Berks County Community Foundation
25	0	0	0	0	75	0	\$ 1,000,000	Lancaster County Community Foundation
92	4	0	0	0	2	2	\$ 2,000,000	York County Community Foundation
71	1	8	1	0	7	12	\$ 3,000,000	Princeton Area Community Foundation
							\$ 5,000,000	Philadelphia Founda
57	2	15	21	1	14	4	\$ 1,947,000	AVERAGE



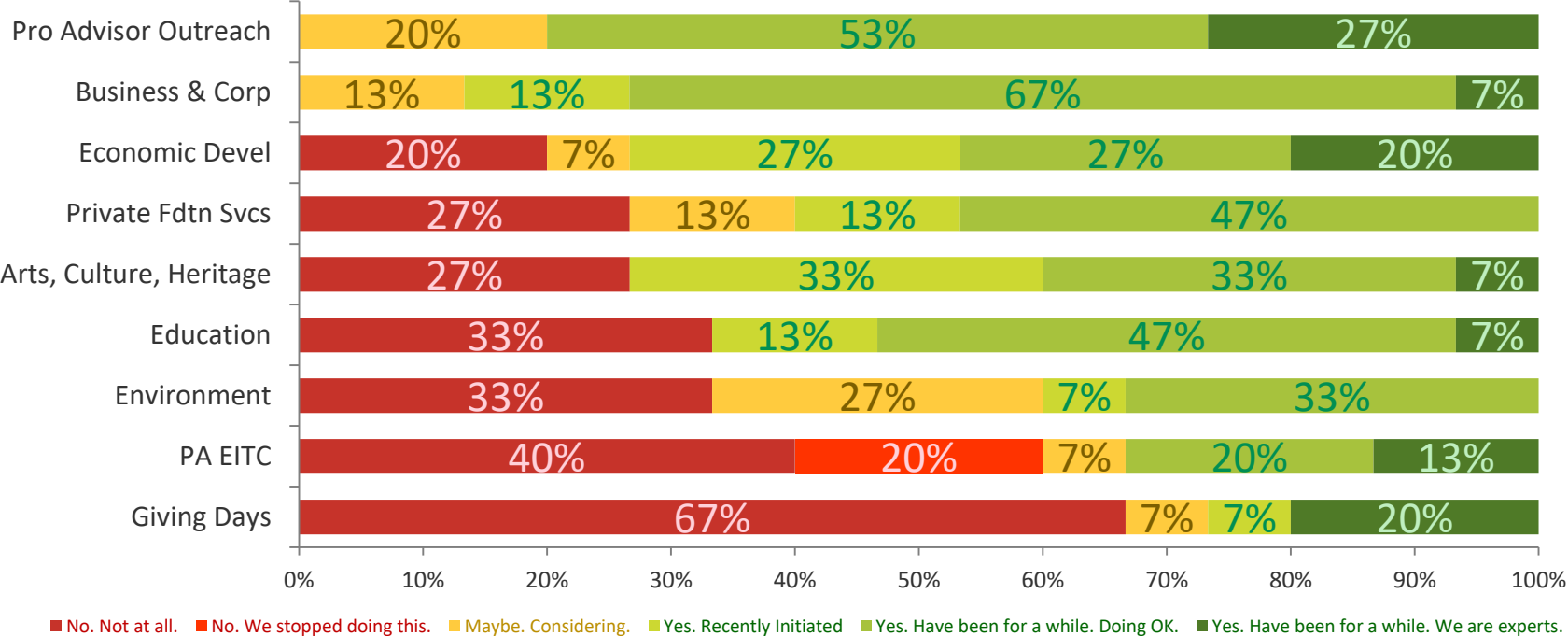
GROWING PHILANTHROPY: Target Markets & Targeted Offerings

Answered: 16 Skipped: 0



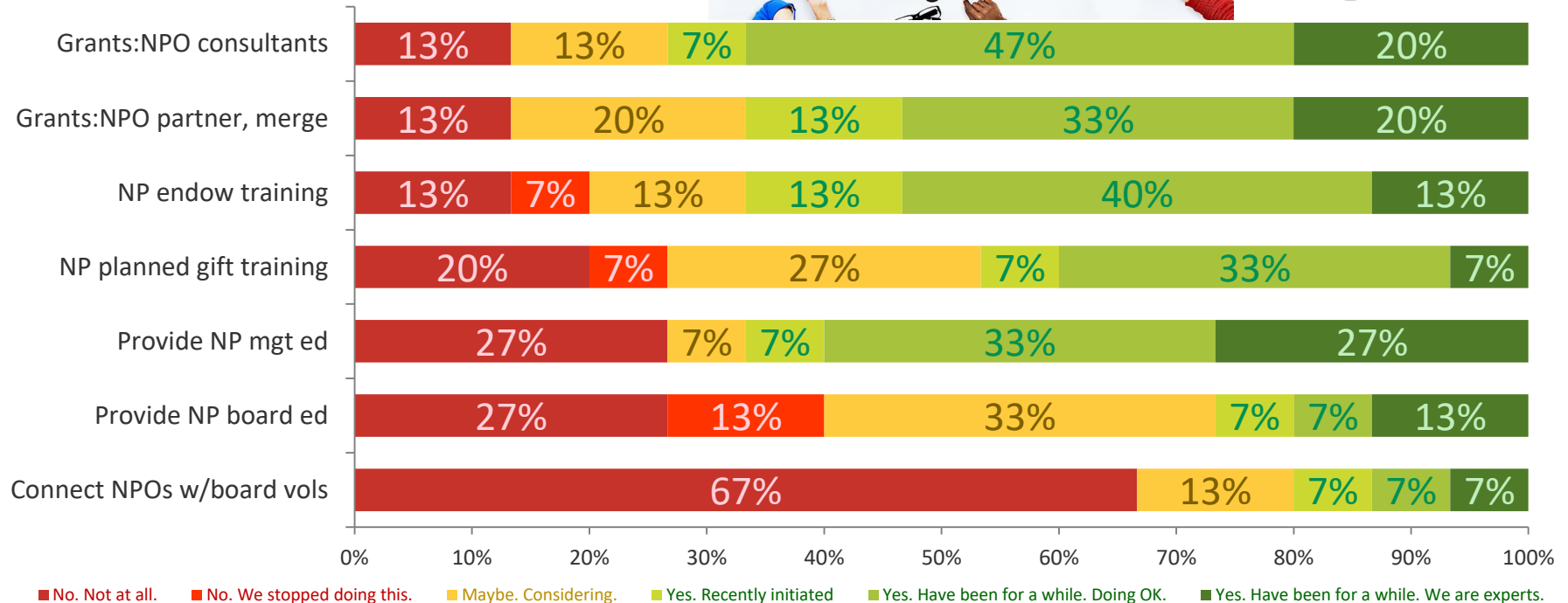
GROWING PHILANTHROPY: Target Markets & Specialized Field of Interest Initiatives

Answered: 16 Skipped: 0

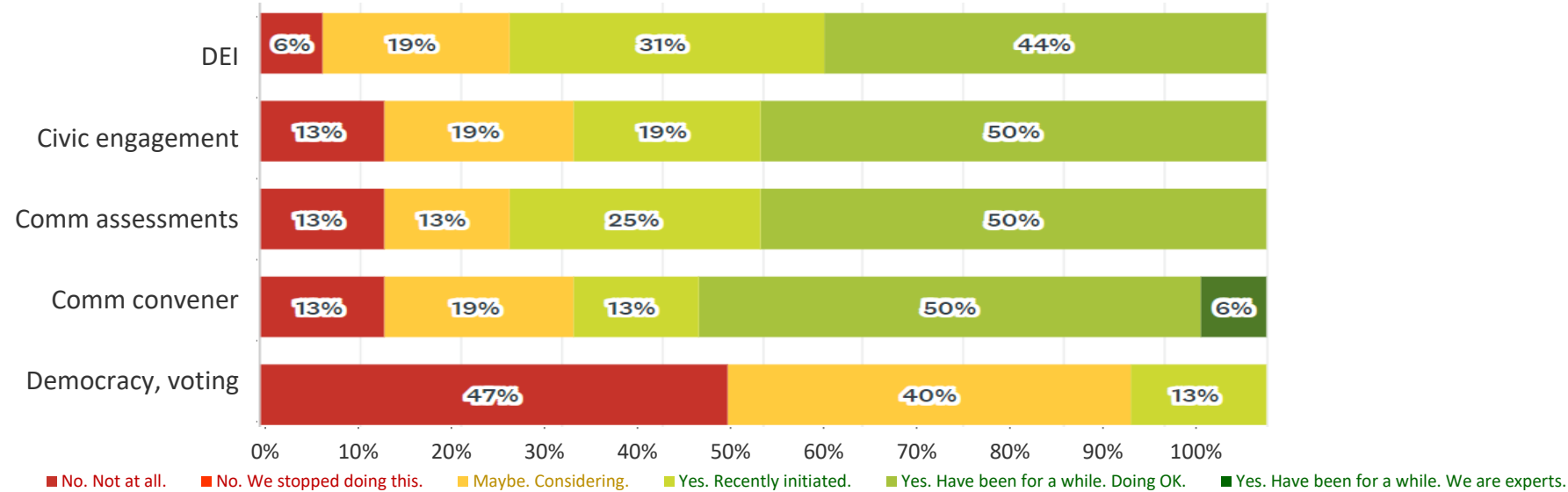


STRENGTHENING NONPROFITS: CF Capacity Building Offerings

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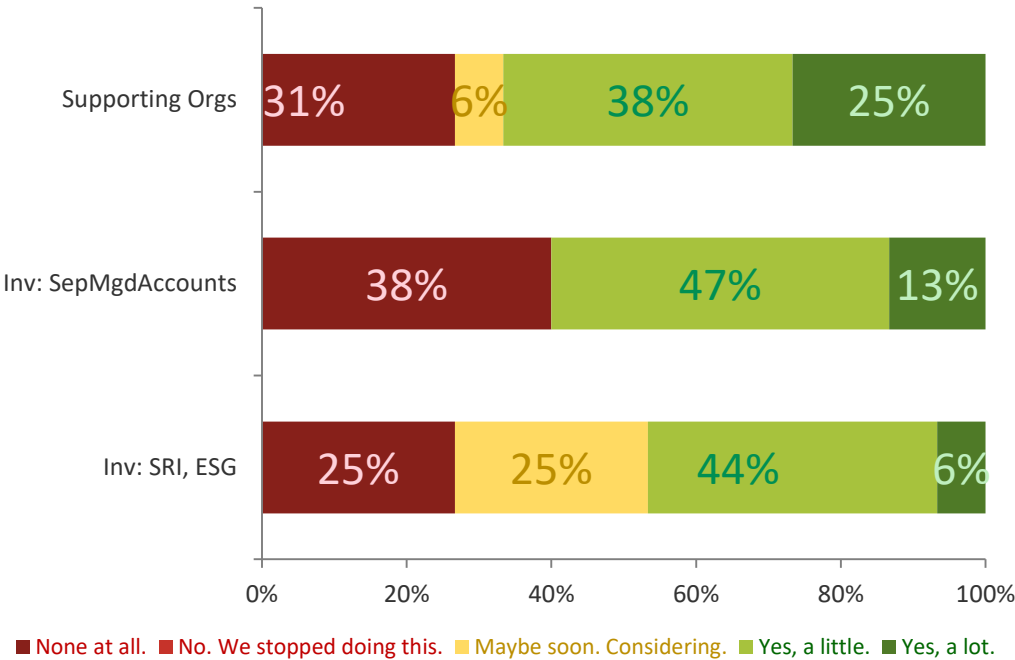


CF COMMUNITY LEADERSHIP INITIATIVES:



CF SPECIALIZED AREAS: Legal & Investment Offerings

Answered: 16 Skipped: 0

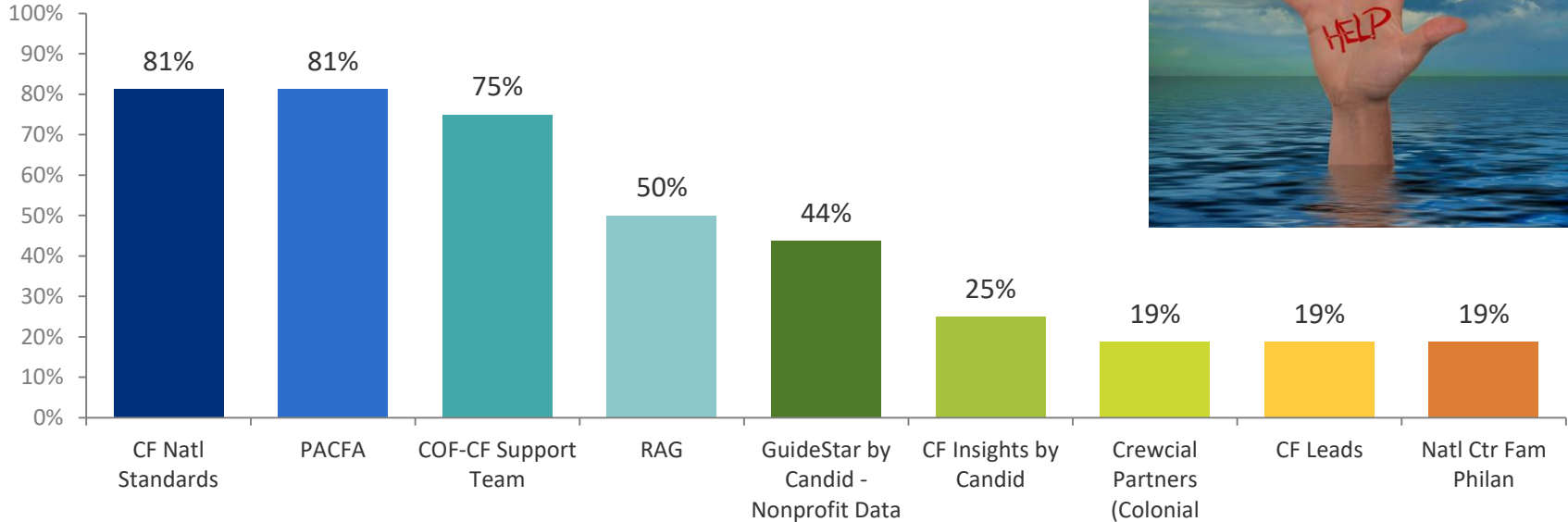


Supporting Orgs	SMA / Medallion	SRI, ESG	
YES	NO	NO	Bucks County Foundation
NO	NO	NO	Carbon County Community Foundation
YES	YES	YES	Adams County Community Foundation
YES	YES	YES	Community Foundation of South Jersey
NO	YES	YES	Washington County Community Foundation
YES	NO	MAYBE	Community Giving Foundation
NO	NO	YES	Foundation for Delaware County
YES	YES	MAYBE	Centre Foundation
MAYBE	YES	YES	Lehigh Valley Community Foundation
NO	YES	MAYBE	Chester County Community Foundation
YES	YES	MAYBE	Community Foundation for the Alleghenies
YES	YES	NO	Berks County Community Foundation
YES	YES	YES	Lancaster County Community Foundation
YES	NO	YES	York County Community Foundation
NO	NO	NO	Princeton Area Community Foundation
YES	YES	YES	Philadelphia Foundation



WHERE DO WE GET HELP: CF Professional Service Orgs

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CF PROFESSIONAL SERVICE ORGANIZATIONS

Crewcial Partners <https://www.crewcialpartners.com/>

Council on Foundations Community Fdtns Support Team <https://www.cof.org/page/community-foundation-programs-services> | communityfoundations@cof.org

COF National Standards <https://www.cof.org/page/national-standards-us-community-foundations%C2%AE>

CF Insights by Candid <https://cfinsights.candid.org/s/>

CF Leads <https://cfleads.org/>

GuideStar by Candid – Nonprofit Data <https://www.guidestar.org/>

National Center for Family Philanthropy <https://www.ncfp.org/community-overview/community-foundations/>

PACFA Pennsylvania Community Foundation Association www.pacfapartners.org

How Did Our CF Fare During COVID?

Answered: 15 Skipped: 1

- OK
- **Fairly positive**
 - We have fared well, with increases in giving and granting.
 - We fared just fine. We were able to shift and provide COVID relief funding.
 - Fine - Response Fund raised our visibility, staff remained despite vaccine mandate with many working from home, and we were in the cloud with all systems so didn't miss a beat. We're all tired though!
 - **We're still here.** Had a record-giving year in FY2021, added to the team. Tough period, but we made it.
 - Our young foundation has continued to grow during COVID. We had a leadership transition in 2020 and so it has been an opportunity for me (the only staff member) to connect with donors and update as the new person at the organization. One of our biggest challenges is awareness that we exist, so the lack of in-person opportunities was tough.
- **Partnerships with local government to disburse COVID Relief funding**
 - As a staff, we adapted to **work from home** protocol well and were able to quickly and efficiently implement an emergency relief fund that raised and awarded approximately \$300,000 to support our community through weekly grantmaking. Financially, despite the challenges we were able to surpass the \$100 million mark in assets.
 - We partnered with the United Way to launch our local COVID Response Fund which we seeded with \$250K. The fund raised more than \$1M which went directly to basic needs support. Internally, we were able to transition to remote work easily and have been emerging from pandemic with an expanded team and more capacity than ever.
 - We quickly mobilized to create the COVID-19 Relief & Recovery Fund. That fund, working in coordination with several other of our grantmaking funds, awarded more than \$3M in grants to local nonprofits. Additionally, we are hosting the NJ **Arts & Culture Renewal Fund**, which has awarded almost \$4.5M statewide.
 - Well. Contributions were stable and was able to raise \$1.2 for a COVID Relief Fund. Working remote and onboarding new staff has been good because it has reduced stress on staff while maintaining service but will need to invest this year in staff/team development to maintain and enhance culture of cooperation. Bigger challenges have been conversion to **new software and conducting DEI training** with staff. These just added more work/stress to a busy team.
 - Initial disbelief **converted** to organizer of other regional funders' responses; centralize info; npo zoom sessions on dealing with COVID; introduced zoom sessions of community social justice issues; survey of npo needs -> increased grantmaking \$3.5M COVID Relief funding

• EMBRACED COMMUNITY LEADERSHIP AND MOVED US FORWARD ON THIS PATH



Our PROUDEST CF initiatives, triumphs &/or learnings over the past few years

Answered: 14 Skipped: 2

•Community leadership during COVID

•We are incredibly proud of the work we did during the pandemic, to quickly get grant dollars to the nonprofits in our region that were helping our most vulnerable neighbors.

Details at <https://pacf.org/wp-content/uploads/Side-by-Side-Community-Foundation-COVID-19-Fund-Grantmaking-Report-1.pdf>

•**All Kids Thrive** program: work with schools and nonprofits early on created trusting relationships, so when the pandemic hit, they knew they could turn to us for help meeting the needs of children and families, including feeding families and keeping kids connected to virtual classrooms.

•We launched **Dolly Parton's Imagination Library** in June 2021 for all of Carbon County.

•**Early Education Fund** to provide bonuses to early educators to attract and retain staff at child care centers.

•Working with PA elected officials to eliminate scholarship displacement

•Using our voice, our time and resources for **ending racial inequities** in our community.

•**BIPOC** initiatives, Black Community Leaders Fund, Forman Arts Initiative, Second Century initiatives (On the Table)

•**Social Impact Fund** to invest in redevelopment projects that revitalize our community and ultimately generate a return.

•We are very proud of our work in founding, funding, and fostering the **Vision Together 2025** civic engagement initiative that is **revitalizing downtown** Johnstown.

•Adding an Endowment Giving Option to our Day of Giving

•The **Extraordinary Give** is our highest profile event. Since 2012 launch, it has generated more than \$82M for nonprofits and we have never taken a penny. It continues to serve its original purposes of highlighting the nonprofit sector, introducing the CF to our community and inviting people into the world of giving. After 10 years, public conversation and our own internal learning has also pushed us to look deeply at how this event intersects with our DEI policies and commit to new practices that align us more deeply with our organizational values.

•We were leaders in partnering with our county government to launch a **new county health department**, and we have built a new housing program from scratch with multiple funding sources including state funds thanks to one of our State Senators.

• Beyond Impact from Census 2020 work

• Launch of **private foundation services** and **family philanthropy** products

• Completed **leadership succession plan** and launched **new strategic plan**

• We are **in the cloud!** Significant technology investments and change

• **Foundant C-Suite** transition

• Receipt and **full rehabilitation** of a grand historic home as our headquarters. The first floor heritage rooms provide a lovely, family-like setting for donor cultivation.

•Communications for Rebranding

•Internally, we are undergoing a transformation to a **new strategy** that supplements (and will ultimately) replace **professional advisor outreach** with a "**direct to donor**" approach.

•**Youth** in Philanthropy, **Women's** Giving Circle, **Stewardship** of stakeholders

•Our grantmaking continues to **grow** year over year as we add new funds and continue to become more of a **presence** in the community.

•**Growth** of our endowments through gifts, our giving day program, our high school program, and our strong communications

•**Stay the course: planned Giving pays off in 3-20 years; plant seeds and cultivate**



WHAT CHALLENGES FACE OUR CF? learning from each other / best practices

ISSUES

- Strengthening internal **DEI** understanding, policies and practices (3)
- Successful projects and programs in community **bridge-building** or civics education (3)
- How do we use our **voice as a community leader**? How do you speak to fundholders and others about this 'new identity'?
- Building **discretionary assets**/getting donors excited about **community change initiatives**
- **Family philanthropy** best practices and approaches
- **Professional advisor outreach beyond our borders** (our donors travel for professional advisory services)
- Better outreach to allied professionals (2)
- **Responding to community issues** as they arise (learn from the group and/or take statewide action)
- Should we continue to host **community indicators** project?
- **Impact investing**/MRI/PRI (3)
- Investment Committee **score card**
- How do we do things differently - more efficiently - as **volume increases** and we have **new technology** available to us
- IT **Conversion**, from Blackbaud to Foundant
- Efficiently managing our **grant process**; how to **build out a team** of program officers with specific content expertise while maintaining a coordinated, holistic, approach to grantmaking.
- Launching a “**Big Gives**” Day



Materials, Attendance List, Initiative Area Listings:

<https://chescof.org/fund/community-foundations-regional-gathering/>



Year Founded	Average	1983 year founded	39 years old
	Range	1918 - 2016 year founded	6 - 104 years old

INTROS in order of CF year founded (starting with **newest** CF)

1 - Our proudest CF initiatives, triumphs &/or learnings over the past few years.

2 - What lies ahead?

What challenges/initiatives face our CF?

Where could we use some help/advice/best practice experience?

Materials, Attendance List, Initiative Area Listings:

<https://chescof.org/fund/community-foundations-regional-gathering/>