



### 3. Our community foundation works in these SPECIALIZED areas to GROW

#### PHILANTHROPY:

	No. Not at all.	No. We stopped doing this.	Maybe. Considering.	Yes. Recently Initiated	Yes. Doing OK.	Yes. Have been for a while. We are experts.
Giving Days / Extraordinary Give	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional Advisor Outreach	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Business & Corporate Charitable Funds	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Foundation Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
PA EITC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Education / Focus On Our Future	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts, Culture, Heritage / Culture Builds Community	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environment / Smart Growth / Sustainability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community Economic Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other GROWING PHILANTHROPY:

### 4. Our community foundation works in these areas of NONPROFIT CAPACITY

#### BUILDING:

	No. Not at all.	No. We stopped doing this.	Maybe. Considering.	Yes. Recently initiated	Yes. Doing OK.	Yes. Have been for a while. We are experts.
Grant funding for nonprofits to hire consultants	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grant funding for nonprofits to partner, collaborate, reposition, merge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide nonprofit management trainings, peer groups	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provide nonprofit board member training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Help nonprofits + new potential board members connect	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Train & support nonprofit planned giving	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Train & support nonprofit endowment-building	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other NONPROFIT CAPACITY BUILDING:

## 5. Our community foundation works in these areas of COMMUNITY LEADERSHIP:

	No. at all.	Not doing this.	No. We stopped doing this.	Maybe. Considering.	Yes. Recently initiated.	Yes. Have been for a while. Doing OK.	Yes. Have been for a while. We are experts.
Civic engagement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Democracy, voting rights, inclusion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community needs assessments / Community report card	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community convening on specific pressing issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Diversity, equity & inclusion initiatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other COMMUNITY LEADERSHIP:

## 6. Our Community Foundation #'s:

Year Founded	<input type="text"/>
# Staff FTE	<input type="text"/>
# Board Members	<input type="text"/>
# Volunteers (not including Board)	<input type="text"/>
# Funds	<input type="text"/>
Population # in Service Area	<input type="text"/>

## 7. The DENSITY & CHARACTER of our geographic service area is approximately

% Rural	<input type="text"/>
% Suburban	<input type="text"/>
% Urban	<input type="text"/>

**8. Our CF's AUM, Gifts in, Grants out, Operating \$, rounded to the nearest Millionth**

\$MILLION Total Assets Under Management	<input type="text"/>
\$MILLION Annual Donations/Gifts Received	<input type="text"/>
\$MILLION Annual Grants & Scholarships/Paid Out	<input type="text"/>
\$MILLION Annual Operating Budget	<input type="text"/>

**9. Our @proportion of entrusted FUNDS, by TYPE (product mix):**

% Donor Advised Funds	<input type="text"/>
% Nonprofit Designated Funds	<input type="text"/>
% Discretionary Funds	<input type="text"/>
% Other Funds	<input type="text"/>

**10. The TIME HORIZON for our CF's entrusted funds is @**

% Fully-endowed (invested to last for perpetuity)	<input type="text"/>
% Quasi-endowed (invested to spend down within several years)	<input type="text"/>
% Provisional/Pass Through (100% granted out, at any time)	<input type="text"/>

**11. We have experience with**

	None at all.	No. We stopped doing this.	Maybe soon. Considering.	Yes, a little.	Yes, a lot.
Supporting Organizations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Separately Managed Investment Accounts/Medallion Investment Partners	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Socially Responsible Investment Offerings/Options (SRI, ESG)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**12. Our CF's OPERATING budget is @**

% Fund Administration Fees	<input type="text"/>
% Fees for Services	<input type="text"/>
% Fundraising for Operating	<input type="text"/>
% Fundraising for Core Programs	<input type="text"/>
% Distribution from Operating Reserve	<input type="text"/>
% Distribution from Operating Endowment	<input type="text"/>
% Other Revenue	<input type="text"/>

**13. Our community foundation is a member of/participates in these PROFESSIONAL SERVICE ORGANIZATIONS:**

- Council on Foundations - Community Fdtns Support Team
- CF Insights by Candid
- National Center for Family Philanthropy
- Crewcial Partners (Colonial Consulting) investment survey
- GuideStar by Candid - Nonprofit Data
- PA Community Foundation Association
- CF National Standards
- CF Leads
- Regional Association of Grantmakers

Other (please specify)

**14. How our community foundation has fared during COVID:**

**15. What DISTINGUISHES our community foundation from others?**

**16. Our PROUDEST initiatives, strategies, triumphs &/or learnings over the past few years:**

**17. This is where our community foundation seeks HELP, learning from others' best practices in the field:**

**18. Contact info:**

Contact	<input type="text"/>
Position	<input type="text"/>
Org	<input type="text"/>
Addr	<input type="text"/>
City/Town	<input type="text"/>
State	<input type="text" value="-- select state --"/>
ZIP	<input type="text"/>
Phone	<input type="text"/>
E-mail	<input type="text"/>
Website	<input type="text"/>