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PA-NJ-Del-MD

Regional Community Foundation Notes

BEST & BRIGHTEST: OPPORTUNITIES & CHALLENGES

2017 Frances Sheehan; DelCo created! Health system, public health program; 58 staff at 4 sites running nurse family partnership & healthy start; statewide campaign to invest state \$ in WIC program children's nutrition across the state; new grant initiatives Children's Campaign; looking at ALL the social determinants that impact health; partnerships.

2009 Andy Frazier, CF South N J 23M; affiliate; strategic plan w community wealth partners of DC; community wealth model; align work with aspirations in SJ; Transform S Jersey Initiative; 203 different municipalities with unique identities; community leadership work to add greatest value. Opportunity to step into community leadership piece; partnering with Orton Fdtn in VT, bringing Community Heart and Soul model into S NJ; establishing a community fund in each of the municipalities, so they can do philanthropy in their own communities; 5 funds in 203 municipalities. DAFs; Women Impact initiative; aiming to grow more unrestricted funds plus connect with philanthropy that is not mega wealth oriented; plus to build FOI.

2007: Hartford County MD; Rhoda Knott; 6 mons tenure; all new staff; looking at things from ground up; started by county government; county admin learned about CFs and wondered why not here; county started CF; gave loaned executive for first few years. "stuck" at 2M assets mark; building a culture of giving from the ground up; working with banks and partners to build financial stability; and encouraging to give back; operationally how to become leaner and grow your presence

1998: Holly Morrison, Central Susquehanna CF; Berwick PA. Started with sale of hospital conversion in Berwick; started with \$27M. In 2003 moved from Berwick H&W Fdtn to Central Susquehanna CF; acquired 5 affiliate boards, including 1 hospital conversion. Strategy; working with Work Wisdom of Lancaster PA; taken us through a journey; strategy sessions; Kedren Crosby consultant. Want to become the first choice for philanthropy while maintaining our personalization with our stakeholders. Regional initiatives : youth in philanthropy; 11 school districts; each has own student advisory board to administer own youth grant round; \$50K annually for youth issues; Women's giving circle w/annual grant round; regional impact fund, our largest unrestricted fund; NP Leaders series, hiring consultants and speakers to help build np capacity; Free professional development for NPOs

1998: Mary Spencer, CF Anne Arundel County. MD \$16M 140 funds. Focus on strategic grantmaking thru Help Our Neighbors Grants. Grants for Teachers. Strengthening NP grants. Fund for Anne Arundel. Matching dollars. Capacity building speakers series. Best practices for NPOs. Penelope Bert, Donor Centered Fundraising and Donor Center Leadership. Administrators for fund after Capital Gazette shooting tragedy. Distributed \$1.9M raised by gifts, for victims and their families for grants to individuals. Worked with COF for legal protocols. Followed 911 Victims Compensation Fund policies. Portion of new funds were gifted to be specifically Endowed in perpetuity to support community healing.

1997: Stacey Crawford, Washington County MD; \$40M at cusp of next big hop. Seeing fruits of labor from board and legacy gifts now coming to fruition. Next strategic plan forthcoming... Varied funds; hardy scholarship program. Shark tank funding program: NPO presentation granted \$ for seed money

1994: Charles Barber, Wilkes Barre Celebrating community, building resources, capital improvements. 100 year old building. Renovations. \$40M new and different programs and services, including back office support for other private foundations, CRTs. ESG interest/opportunities. FIMS-based CF. Capital campaign to grow unrestricted assets by 150%. Strategic planning next. Millennials. Chas Just Say No. Youth Advisory Committee YAC w 11 school districts. Last year added a forum for NPOs to present in forum to youth; came alive to youth. Modified granting with 2 NPO forums, each day heard from 33 NPOs from 94 applicants in forums. Awarded \$10K and \$25K grants. Awarded at annual dinner. Huge way to engage NPOs and donors; demonstrated who we were. NP Forums are great opportunity to invite private fdtns, fund advisors, community activists; new and different things learned.

1994: Chester County Community Foundation. Inspire Celebrate Grow 25 years. F&N

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1991: Jeff Vega, Princeton Area CF. Completed strategic plan. Started and launched new plan this year. Grew significantly in asset base, mostly due to investment returns and Princeton U investment co. manage 26B endowment for Princeton; Andy Golden gives CF assets to his managers at Princeton. At \$100M a few years ago. Now at \$180M. Hard work with private foundation conversions; working thru professional advisors, and strong growth of agency funds. In last strategic plan emphasis was to grow community leadership portion; reinvented community grantmaking into All Kids Thrive for deeper dive into chronic absenteeism. Per Kids County Mercer County ranked 19 or 21 for education outcomes due to chronic absenteeism. Education is way out of poverty; but poverty stops kids from getting to school. Funded 10 school np partnerships. \$300K x 10 = \$3M to move the needle on chronic absenteeism.

Community Impact grants for Responsive grantmaking; joined forces with Berks Fdtn of J&J CEO grow pool of funds; to hunger, mental health, and social issues. Supporting FOI and Giving Circles. FW&G. Reached over \$1M with 800K endowed. Launched Next Gen giving circle; brought 30 into group; support philanthropy & decision making; @\$20K donations from 30 people. 1 private foundation conversion refocusing on capacity building Bun Berry Fund. Board has launched a committee for how to do we Sustain Ourselves? 1% doesn't pay for it. Just completed a time/motion study; to think about how we grow; increase fees? Diversify fees? How do we support ourselves? How should we reinvent our business model to sustain ourselves into the future...?

1990: Angie, CF Alleghenies in Johnstown PA. 4 county service areas with 250K people. Big story is growth these past few years. Expanded tremendously. Moved into new space downtown, doubled size, conference room for community groups. Still have 11 staff; transitioned from part time to more full time. 74M FY18E. Middle of strategic plan with growth identified as key. Aiming for \$90M by 2022 due to challenge for \$10M endowment application to get over \$100M. Pilot program on early childhood education and economic development as key pockets of need. Focused investment grants; \$500K x 3 years from anonymous donor as part of challenge. Seeing momentum in community. Added Library NP Resource Center; FDTN center adding. CHALLENGES: On development side, we struggle with family philanthropy & next gen giving. Some of our older DAFS are converted to unrestricted grantmaking; but missing successors and intergenerational opportunity. Location in 1 county. Serve 3 other counties; strong local identities.

1986: Stuart Comstock Gay, Delaware Community Fdtn. Transition from "do good-er bank" to a more public facing org, with specific targets toward opportunity.

Development work: big investment of new money in marketing; board went into reserves \$150K social media; professional advisors; fund holders; different ways to give; starting to pay nice dividends. Big increase on work with PAs. New Impact investing work; social impact bond. 2nd donor satisfaction survey with center for effective philanthropy

New IMPACT work: leaned into Community Impact, framed around Opportunity Gap. Bob Putnam came and spoke on On Town; 50 book groups throughout state; gave away 500 books. Has led to changes in grantmaking; Latino issues; youth issues; equity issues. Just created an equity cohort to look at equity issues in Wilmington. Mott Fdtn report \$ "What is the Latino community in Sussex County. SWOT.

Starting to engage in 3-part backbone organization, healthy community for DE. State dept of public health, U of DE & CF; \$3.5 million to align funding toward issues.

1986: Betsy Day, Frederick Co MD. Founded by An attorney, CPA & Chief of Police. Supported by community. In 2010 we decided we were being too reactionary; 1st needs assessment by Johns Hopkins U. School Readiness. Access to Healthcare / ACA; and services to newly homeless and precariously housed. 2011 tried to raise some unrestricted funds. In 2018 realized community changed dramatically; new needs assessment: substance ab use disorder; aging; Alice families UW report on sustainability budget for families in each community 30 GCI for housing is recommended; started Funders group w/UW, 4 private funders; same grantmaking software, users group, collaborative funding & collaborative training. Grantee Training in output & outcomes. Evaluation skills. Glad to share curriculum for outcome / evaluation training. Logic model seminars and application sessions. 2019 20M unrestricted endowment campaign; over halfway mark started with low hanging fruit; much more work ahead. Case for support & video; check out website3; great feedback using our materials as example thanks to media firm. Launching Frederick County campaign. Needs are defined in funding, collaboration, agendas. Funders Group is bringing NP with Balls; NPF Vu Le, diversity and inclusion

1986: Ralph Serpe of Adams County (Gettysburg)_ CF. Bookmark CF Frederick Count & Forever Frederick case statement for support plus Adams County 2018 annual report, which tells what a CF is. Great tools for raising unrestricted assets for

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community. \$600K over 22 years; 10 years. to get to \$10M; now at \$16M with \$16M in pipeline. CF Standards YES! Scholarship displacement issue. Did first scholarship breakfast this year, with donors, guests, scholars; heartwarming moments, great speaker. Intro Fdtn to a different audience. Giving spree in November 1 night; party atmosphere. 2000+ guests decide which npo they'll give their golden coin to. Generates excitement and gets children involved. Incentivize NPOs to attend and donors; stretch pools for matching funds. Separate stretch pool for endowed funds. \$10K to \$300K to \$737K raised in 3 hr window in Nov; shooting for \$1 million this year. Festive. 5 years ago switched from quick books to community pearl bookkeeping. Sales tax exemption status revoked by PA this year, as Giving is not substantial compared to contributions. Appealing. Watch it in PA. Lisa Program made transition from focusing on NPs to our donors; make grants that make a difference, rather than serving as many NPs as possible. NPOS felt like we were ignoring them. Making grants in focus areas, that can make a difference. In 2 short years, inspiring donors to make unrestricted gifts. Didn't take that long for the community to have faith that we would ID community needs and apply to charities where it would do the most good. Took 2 years. Also have 3 yr affordable housing initiative. Transportation. Economic development. With all of these changes, local print media have moved news of CF from Living to News. Purposeful sit down to move us onto the News section.

1979: Linda Goodwin, Bucks County. Linda was hired as first and only staff person in 2004. Just wrapped up a very successful scholarship season; 300 scholarships given to every school county.

1979: Mike, Jewish CF in Burlington County NJ; spun off from Jewish Federation; from a few files to multiple cabinets". Coming off a successful 5 yr program by H Goodman Fdtn in MA to get Jewish orgs thinking about the future. Working closely with 20 orgs which have grown \$300M in endowed funds. Now focusing on gift stewardship. Currently hold \$30M DAFs. Scholarships. Scholarship reception great feedback warm and exciting. Touchpoint with general public. Recommended. Staff wears many hats. Marketing/comm/events/ grants.

1973 Joanne Pipkin Greater Washington CF. DC. DMV District Md Va. Feels like 4 different countries. 36 on staff, 30 located 2 blocks from white house; office in Prince George County w 3 staffers and 3 others in MontCo. Founded by local philanthropists including Katherine Graham of WPost. \$350 M. Mostly DAFs. New CEO as of 2015; prior CEO managed CF for 20 years; region has changed. Amazon.com will be across the river in Arlington soon. 5x home value increase; external changes. 2 years ago Voices DMV. Partnered with Urban Institute & Gallup to interview 3000+ people re Strategy & Community Discussions. Reboot Voices DMV2.0 coming soon. In DC alone 7K people are homeless nightly in DC district 10 sq miles. Partnership to end homelessness. Rare. Brief. Nonrecurring. Also launched Children's Opportunity Fund education is key. Also launched Workforce initiative. Safety net Education. WorkForce strategy. Being creative in an area with transitional issues. Pro Advisors ... speakers. Opportunity Zones. Tax advantage program.

1972 Kim. Baltimore CF. \$174M assets. 850 funds. 25 member board. 1 county. X population. Since 2018 BCF has new CEO after longtime retirement. Impact Investing launched in 2018. Program \$3.5M invested 18 months later in local businesses and projects. MD became first state to ban polystyrene; youth converged/rallied on city hall as part of youth philanthropy program. LGBT fund launched in 2018, with advisory committee. Inspired by a small group of trustees & donors to, provide life affirming supports. Intersection of neighborhoods and schools Converting from FIMS to RE.

1967 Trisha Higgins, Lehigh Valley CV. Dt Allentown. 2 counties Lehigh & Northampton. Staff of 8. \$60M. 250 Funds. Steady growth over past 5 years. Increasing visibility and PA work; sinking in; message is getting out there. People are 3 starting to learn and understand what we do. Working with PAs on municipalities who want to do FR for community centers; churches sold and establishing endowment funds. Exploring Family Philanthropy. Formed Board of Associates with 150 members semi-annual meetings; great speakers brought in 2x /yr. Discretionary grantmaking NP Effectiveness. Partnering with UW. 2020 Census. We are only funder in Lehigh Valley that is putting grantmaking \$ into community to help NPOs get the complete count right in our area; significant risk of being undercounted in some areas. New Tag Line: Connect. Grow. Fund. Implemented Donor Central; donors say it's fabulous to see grants/gifts. Established ESG portfolios esp. for church that asked. People are unsure of what it means to them, but we have it.

1960 Vibha Agrawal & Virginia Frantz, Montgomery County PA. Exec Dir roundtable 12 exec leaders meet monthly convened at CF to discuss board governance, FR, staffing issues, peer counseling & mentoring. 5 years running. Confidential mtgs to share successes and challenges. Strategic plan to grow asset base on DAF, Women in Philanthropy; unrestricted assets. Q how to grow operating budget. Your Way Home MontCo Project partner: goal to make homelessness rare, brief, nonrecurring. Restructuring org; adding operations person; switching from Fondant to Community Suites software.

1954: Maggie Martinelli, Scranton Area CF: 65th Sapphire Anniversary. Celebrating. \$41M assets 200 funds. plus \$30 M AUM for 2 other s one private one health care conversion. Staff of 5 ft 1 pt. NEPA Moves/Equitable Transportation issues. Women In philanthropy Program w 100 members \$1.5M. Just rolled out CGAs to grow agency endowment funds.

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Medallion partner financial advisor program, some good growth. Center for Community Leadership & NP Excellence – capacity building, esp. trainings by Board Source, Grantsmanship Center. Inaugural NEPA learning conference w/funders component. Leslie Crutchfield Effective NP Keynote. Transition from QuickBooks and Donor Perfect to Foundant and Community Suite. Nepalearningconference.com - 9/19

1924: Sam Bressi, Lancaster Co CF. 550 people in Lancaster County. North vs South re: income. 2011 AHA initiative, innovation; to disrupt what the sector is doing and challenge our community to think bigger, take risks, be ok with failure, learn from failure. Wanted to be 1st dollar in; consider ourselves social venture capital. Some things tanked, some things were transformational. Helped our CF to embrace risk ourselves. Embracing equity & inclusion as the passionate center for everything we do. Have worked hard to diversify staff team, board, invested time & energy in learning & listening. Committed organizationally to asking the question, “Who’s not at the table and who needs to be, to solve problems and advance community opportunities.” ACTIVATE & AMPLIFY initiative. Knight Fdn grants to do Human Centered Design. Applying thru Community Hubs where people come and get services; while there, we are building partnerships with hubs...what would make your life better, would make the community better. Investing in ideas that come directly from the people we listen to. AMPLIFY: we are social sector. The financial power in the community rests in the private sector. AMPLIFY GOOD being headed by a B Corp social investor. EXTERAORDINARY GIVE is working well in Lancaster; branding and connecting communities, since 2012; deep connections and trust building in communities that hadn’t known us before.

1920 Janice Black, Fdn for Enhancing Communities/greater Harrisburg. 1981 1st employee. Fund for W&G. Emerging Philanthropy partnership with Chamber/Harrisburg young professionals. Monthly for 10 month mtgs to teach about philanthropy. Early Ed program. 70 projects. Management agreements to manage other fdtns and background services for NPOs. 43M AUM in that program. 6th year emerging philanthropy program in place. Harrisburg Hoopla event completely spearheaded by emerging philanthropy. Women in Philanthropy. Making \$25K x 4 = \$100K in grants next yr for 100th anniversary. Early education; transition K=readiness. Serving in advocacy role for providers. Trauma informed community/resilience mode3ls. Train the Trainers program to take into community in early education program. CSI services-expanded. 8 corporate funds. ESG portfolios. Crypto-currency.

1918: Pedro Ramos, Philadelphia Fdn, 12/22/18 born in bank boardroom. Launch of our 2nd Century campaign. Allowing public voting on \$1m in grants, working from 200 RFPs to 15 to put out to the public for 9 grantees chosen by public online vote. Top in each category g ranted \$200K, 100K, 33K. To bring greater attention to the work of NPs and the quality of life. To have a way to engage before giving. Bring traffic to NPOs and mobilize public support. Cannot underestimate the value and power of Permanence and Place. Continuous asset and resource knowledge. 2017 new strategy adopted with CEO transition. Listened to how we are perceived, and what we need to be now and going forward; and what do you want us to do. Use our scale, leadership, visibility to have a voice. Use Our Voice. Wear Our Values On Our Sleeves. Engage Broadly. Own the Leadership in our Community. Including the following part of leading. Go to resource in our community. Grow our resources and our impact. Willing to play a leadership role w hen needed in the community. Align and grow our org capacity around the needs; activate all this amazing knowledge that we have in our capacity as a grantmaking; break down the walls and let info flow. 40% asset growth over 4 years and 70% endowed. Initiative3s: 2nd century; Chat & Chews/On the Table; NP Capacity; Lenfest Journalism Institute to keep the 4th estate of our democracy pillar alive at the local level. LGBT roots are long and deep; trust & support & generosity. Looking at Impact arena, in collaboration with Reinvestment Fund. Piloting DAF with High entry level that ONLY invests in Impact Fund. Catch a Fire partnership skills hub, to engage on the volunteer side to amplify corporate partnership, boomer & millennial volunteerism. Collaborating with a funder who wants to do something substantial for youth aging out of foster care; cooperation of govt entities even when someone is offering to pay for a solution. PA is Ready statewide initiative to support Immigrants’ Rights NPOs. NP Effectiveness / Gr Philanthropy NP Repositioning Fund to explore partnerships, collaborations, mergers. RISE UW. Eagles Football Social Justice Fund. Corporate Volunteer Council new home at Philanthropy Fdn. Centennial relationship building & visibility.

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