

# Berks County Community Foundation

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## Q1

Our Community Foundation's MISSION STATEMENT:

promote philanthropy and improve the quality of life for the residents of Berks County

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## Q2

Our community foundation works in these areas to GROW PHILANTHROPY:

Emerging Philanthropists: Youth Philanthropy (high school)	<b>Yes. Have been for a while. We are experts.</b>
Emerging Philanthropists: Young Adults (college)	<b>No. Not at all.</b>
Next Gen Philanthropists: Millennials (age @21-45)	<b>No. We stopped doing this.</b>
Family & Individual Philanthropy	<b>Yes. Have been for a while. We are experts.</b>
Women & Girls' Fund	<b>Yes. Have been for a while. Doing OK.</b>
Giving Circles	<b>Yes. Have been for a while. Doing OK.</b>
Due Diligence / Smart Grantmaking Training	<b>No. Not at all.</b>

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## Q3

Our community foundation works in these SPECIALIZED areas to GROW PHILANTHROPY:

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

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**Q4**

Our community foundation works in these areas of NONPROFIT CAPACITY BUILDING:

Grant funding for nonprofits to hire consultants	<b>Yes. Have been for a while. Doing OK.</b>
Grant funding for nonprofits to partner, collaborate, reposition, merge	<b>Yes. Have been for a while. Doing OK.</b>
Provide nonprofit management trainings, peer groups	<b>Yes. Have been for a while. Doing OK.</b>
Provide nonprofit board member training	<b>No. We stopped doing this.</b>
Help nonprofits + new potential board members connect	<b>Yes. Have been for a while. Doing OK.</b>
Train & support nonprofit planned giving	<b>No. We stopped doing this.</b>
Train & support nonprofit endowment-building	<b>No. We stopped doing this.</b>

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**Q5**

Our community foundation works in these areas of COMMUNITY LEADERSHIP:

Civic engagement	<b>Yes. Have been for a while. Doing OK.</b>
Democracy, voting rights, inclusion	<b>Maybe. Considering.</b>
Community needs assessments / Community report card	<b>Yes. Have been for a while. Doing OK.</b>
Community convening on specific pressing issues	<b>Yes. Have been for a while. Doing OK.</b>
Diversity, equity & inclusion initiatives	<b>Yes. Have been for a while. Doing OK.</b>

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**Q6**

Our Community Foundation #'s:

Year Founded	<b>1994</b>
# Staff FTE	<b>11</b>
# Board Members	<b>13</b>
# Volunteers (not including Board)	<b>100</b>
# Funds	<b>350</b>
Population # in Service Area	<b>419062</b>

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**Q7**

The DENSITY & CHARACTER of our geographic service area is approximately

% Rural	<b>50</b>
% Suburban	<b>25</b>
% Urban	<b>25</b>

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**Q8**

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

\$MILLION Total Assets Under Management	<b>150</b>
\$MILLION Annual Donations/Gifts Received	<b>30</b>
\$MILLION Annual Grants & Scholarships/Paid Out	<b>3.6</b>
\$MILLION Annual Operating Budget	<b>2</b>

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<b>Q9</b>	% Donor Advised Funds	<b>11</b>
Our @proportion of entrusted FUNDS, by TYPE (product mix):	% Nonprofit Designated Funds	<b>26</b>
	% Discretionary Funds	<b>48</b>
	% Other Funds	<b>15</b>

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<b>Q10</b>	% Fully-endowed (invested to last for perpetuity)	<b>95</b>
The TIME HORIZON for our CF's entrusted funds is @	% Quasi-endowed (invested to spend down within several years)	<b>3</b>
	% Provisional/Pass Through (100% granted out, at any time)	<b>2</b>

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**Q11**

We have experience with

Supporting Organizations	<b>Yes, a lot.</b>
Separately Managed Investment Accounts/Medallion Investment Partners	<b>Yes, a lot.</b>
Socially Responsible Investment Offerings/Options (SRI, ESG)	<b>None at all.</b>

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<b>Q12</b>	% Fund Administration Fees	<b>80</b>
Our CF's OPERATING budget is @	% Fees for Services	<b>9</b>
	% Other Revenue	<b>11</b>

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**Q13**

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

**Council on Foundations - Community Fdtns Support Team**  
,  
**CF National Standards,**  
**PA Community Foundation Association**

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**Q14**

How our community foundation has fared during COVID:

We're still here. Had a record-giving year in FY2021, added to the team. Tough period, but we made it.

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**Q15**

What DISTINGUISHES our community foundation from others?

Our % of permanent, discretionary assets seems to be unusually high relative to many community foundations. We also carry a very low % of DAFs.

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**Q16**

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

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.

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**Q17**

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

Eagerly learning how to build out a team of program officers with specific content expertise while maintaining a coordinated, holistic, approach to grantmaking.

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**Q18**

Contact info:

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