

Chester County Community Foundation

Q1

Our Community Foundation's MISSION STATEMENT:

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

Q2

Our community foundation works in these areas to GROW PHILANTHROPY:

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

Q3

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

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

Q4

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

Grant funding for nonprofits to hire consultants	Yes. Have been for a while. We are experts.
Grant funding for nonprofits to partner, collaborate, reposition, merge	Yes. Have been for a while. We are experts.
Provide nonprofit management trainings, peer groups	Yes. Have been for a while. We are experts.
Provide nonprofit board member training	Yes. Have been for a while. We are experts.
Help nonprofits + new potential board members connect	Yes. Recently initiated
Train & support nonprofit planned giving	Yes. Have been for a while. Doing OK.
Train & support nonprofit endowment-building	Yes. Have been for a while. Doing OK.

Q5

Our community foundation works in these areas of COMMUNITY LEADERSHIP:

Civic engagement	Maybe. Considering.
Democracy, voting rights, inclusion	Maybe. Considering.
Community needs assessments / Community report card	Maybe. Considering.
Community convening on specific pressing issues	Yes. Recently initiated.
Diversity, equity & inclusion initiatives	Yes. Recently initiated.

Q6

Our Community Foundation #'s:

Year Founded	1994
# Staff FTE	10
# Board Members	25
# Volunteers (not including Board)	50
# Funds	425
Population # in Service Area	522000

Q7

The DENSITY & CHARACTER of our geographic service area is approximately

% Rural	25
% Suburban	45
% Urban	30

Q8

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

\$MILLION Total Assets Under Management	90
\$MILLION Annual Donations/Gifts Received	12
\$MILLION Annual Grants & Scholarships/Paid Out	5
\$MILLION Annual Operating Budget	1

Q9		% Donor Advised Funds	59
Our @proportion of entrusted FUNDS, by TYPE (product mix):		% Nonprofit Designated Funds	7
		% Discretionary Funds	14
		% Other Funds	20

Q10		% Fully-endowed (invested to last for perpetuity)	67
The TIME HORIZON for our CF's entrusted funds is @		% Quasi-endowed (invested to spend down within several years)	21
		% Provisional/Pass Through (100% granted out, at any time)	12

Q11		
We have experience with		
Supporting Organizations		None at all.
Separately Managed Investment Accounts/Medallion Investment Partners		Yes, a little.
Socially Responsible Investment Offerings/Options (SRI, ESG)		Maybe soon. Considering.

Q12		% Fund Administration Fees	83
Our CF's OPERATING budget is @		% Fees for Services	0
		% Fundraising for Operating Programs	9
		% Fundraising for Core Programs	0
		% Distribution from Operating Reserve	0
		% Distribution from Operating Endowment	10
		% Other Revenue	-2

Q13

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

Council on Foundations - Community Fdtns Support Team

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Crewcial Partners (Colonial Consulting) investment survey

,

CF National Standards,

GuideStar by Candid - Nonprofit Data,

National Center for Family Philanthropy,

PA Community Foundation Association,

Regional Association of Grantmakers

Q14

How our community foundation has fared during COVID:

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

Q15

What DISTINGUISHES our community foundation from others?

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

Q16

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

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

Q17

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

IT Conversion, from Blackbaud to Foundant

Investment Committee score card

Q18

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