

Lehigh Valley Community Foundation

Q1

Our Community Foundation's MISSION STATEMENT:

The Lehigh Valley Community Foundation promotes 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.

Q2

Our community foundation works in these areas to GROW PHILANTHROPY:

Emerging Philanthropists: Youth Philanthropy (high school)	No. Not at all.
Emerging Philanthropists: Young Adults (college)	No. Not at all.
Next Gen Philanthropists: Millennials (age @21-45)	Maybe. Considering.
Family & Individual Philanthropy	Yes. Recently initiated.
Women & Girls' Fund	Maybe. Considering.
Giving Circles	No. Not at all.
Due Diligence / Smart Grantmaking Training	Yes. Recently initiated.

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. Doing OK.
Business & Corporate Charitable Funds	Yes. Have been for a while. Doing OK.
Private Foundation Services	Yes. Recently Initiated
PA EITC	Maybe. Considering.
Education / Focus On Our Future	No. Not at all.
Arts, Culture, Heritage / Culture Builds Community	Yes. Recently Initiated
Environment / Smart Growth / Sustainability	No. Not at all.
Community Economic Development	Yes. Recently Initiated
Other GROWING PHILANTHROPY:	Bi-monthly nonprofit "visits" for donors; co-hosting CAP study groups; willing to explore acceptance of complex assets (crypto this year); Formalized and launched regional funders network in LV

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. Doing OK.
Grant funding for nonprofits to partner, collaborate, reposition, merge	Yes. Have been for a while. Doing OK.
Provide nonprofit management trainings, peer groups	Yes. Recently initiated
Provide nonprofit board member training	Maybe. Considering.
Help nonprofits + new potential board members connect	No. Not at all.
Train & support nonprofit planned giving	No. Not at all.
Train & support nonprofit endowment-building	Yes. Have been for a while. Doing OK.
Other NONPROFIT CAPACITY BUILDING:	Focus on racial equity journey to build more equitable and therefore sustainable system

Q5

Our community foundation works in these areas of COMMUNITY LEADERSHIP:

Civic engagement	Yes. Recently initiated.
Democracy, voting rights, inclusion	Maybe. Considering.
Community needs assessments / Community report card	No. Not at all.
Community convening on specific pressing issues	Yes. Recently initiated.
Diversity, equity & inclusion initiatives	Yes. Recently initiated.
Other COMMUNITY LEADERSHIP:	Gathering data from nonprofits in a coordinated way among funders

Q6

Our Community Foundation #'s:

Year Founded	1967
# Staff FTE	9
# Board Members	18
# Volunteers (not including Board)	20
# Funds	285
Population # in Service Area	900000

Q7

Respondent skipped this question

The DENSITY & CHARACTER of our geographic service area is approximately

Q8

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

\$MILLION Total Assets Under Management	85
\$MILLION Annual Donations/Gifts Received	13
\$MILLION Annual Grants & Scholarships/Paid Out	6
\$MILLION Annual Operating Budget	1.2

Q9

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

% Donor Advised Funds	28
% Nonprofit Designated Funds	45
% Discretionary Funds	20
% Other Funds	7

Q10

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

% Fully-endowed (invested to last for perpetuity) **80**
 % Quasi-endowed (invested to spend down within several years) **5**
 % Provisional/Pass Through (100% granted out, at any time) **15**

Q11

We have experience with

Supporting Organizations

Maybe soon. Considering.

Separately Managed Investment Accounts/Medallion Investment Partners

Yes, a lot.

Socially Responsible Investment Offerings/Options (SRI, ESG)

Yes, a little.

Q12

Our CF's OPERATING budget is @

% Fund Administration Fees **72**
 % Fees for Services **1**
 % Fundraising for Operating Programs **3**
 % Fundraising for Core Programs **4**
 % Distribution from Operating Reserve **3**
 % Distribution from Operating Endowment **17**

Q13

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

Council on Foundations - Community Fdtns Support Team
 ,
GuideStar by Candid - Nonprofit Data,
PA Community Foundation Association

Q14

How our community foundation has fared during COVID:

Embraced community leadership and moved us forward on this path

Q15

What DISTINGUISHES our community foundation from others?

Nonprofit capacity building program

Q16

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

Community leadership during Covid and 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

Q17

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

How do we do things differently - more efficiently - as volume increases and we have new technology available to us?
How do we use our voice as a community leader? How do you speak to fundholders and others about this 'new identity'?
Family philanthropy best practices and approaches
Responding to community issues as they arise (learn from the group and/or take statewide action)

Q18

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