

Philadelphia Foundation

Q1

Our Community Foundation's MISSION STATEMENT:

For more than a century, Philadelphia Foundation has increased philanthropic investment in the community, fostering the economic, civic and social vitality of Greater Philadelphia.

We take charitable dollars further through our deep relationships in the community, close connections with local nonprofits and 100-year history of building positive outcomes in the Philadelphia region.

Born of a desire for more powerful, permanent funding to address community needs, we collaborate with thousands of individuals, families and businesses to advance this goal, always with an eye on the future. As we enter our second century of service, our vision remains grounded in the needs of today and tomorrow and is shaped by the values we hold close, including excellence, diversity, equity and results.

From Ben Franklin's civic gift of 1,000 pounds sterling to Gerry Lenfest's endowment for independent journalism, Philadelphia Foundation stewards legacies that strengthen the place we call home, improving lives today and for future generations.

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)	Maybe. Considering.
Next Gen Philanthropists: Millennials (age @21-45)	Maybe. Considering.
Family & Individual Philanthropy	Yes. Have been for a while. Doing OK.
Women & Girls' Fund	Yes. Have been for a while. Doing OK.
Giving Circles	Yes. Have been for a while. Doing OK.
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. Doing OK.
Business & Corporate Charitable Funds	Yes. Have been for a while. Doing OK.
Private Foundation Services	Yes. Have been for a while. Doing OK.
PA EITC	No. Not at all.
Education / Focus On Our Future	Yes. Have been for a while. Doing OK.
Arts, Culture, Heritage / Culture Builds Community	Yes. Have been for a while. Doing OK.
Environment / Smart Growth / Sustainability	No. Not at all.
Community Economic Development	No. Not at all.
Other GROWING PHILANTHROPY:	Civic Leadership, Equity

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	No. Not at all.
Provide nonprofit board member training	No. Not at all.
Help nonprofits + new potential board members connect	No. Not at all.
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	Yes. Have been for a while. Doing OK.
Community needs assessments / Community report card	Yes. Have been for a while. Doing OK.
Community convening on specific pressing issues	Yes. Have been for a while. Doing OK.
Diversity, equity & inclusion initiatives	Yes. Have been for a while. Doing OK.

Q6	Year Founded	1918
Our Community Foundation #'s:	# Staff FTE	19
	# Board Members	18
	# Volunteers (not including Board)	71
	# Funds	1100
	Population # in Service Area	5000000

Q7	% Rural	10
The DENSITY & CHARACTER of our geographic service area is approximately	% Suburban	30
	% Urban	60

Q8
Our CF's AUM, Gifts in, Grants out, Operating \$, rounded to the nearest Millionth

\$MILLION Total Assets Under Management	802
\$MILLION Annual Donations/Gifts Received	158
\$MILLION Annual Grants & Scholarships/Paid Out	78
\$MILLION Annual Operating Budget	5

Q9 Our @proportion of entrusted FUNDS, by TYPE (product mix):	% Donor Advised Funds	17
	% Nonprofit Designated Funds	15
	% Discretionary Funds	48
	% Other Funds	20

Q10 The TIME HORIZON for our CF's entrusted funds is @	% Fully-endowed (invested to last for perpetuity)	81
	% Quasi-endowed (invested to spend down within several years)	19

Q11 We have experience with	
Supporting Organizations	Yes, a lot.
Separately Managed Investment Accounts/Medallion Investment Partners	Yes, a little.
Socially Responsible Investment Offerings/Options (SRI, ESG)	Yes, a little.

Q12

Respondent skipped this question

Our CF's OPERATING budget is @

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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CF National Standards,

CF Insights by Candid,

GuideStar by Candid - Nonprofit Data,

PA Community Foundation Association,

Regional Association of Grantmakers

Q14

How our community foundation has fared during COVID:

fairly positive

Q15

What DISTINGUISHES our community foundation from others?

Visible turn to resource, civic leadership

Q16

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

BIPOC initiatives, Black Community Leaders Fund, Forman Arts Initiative, Second Century initiatives (On the Table)

Q17

Respondent skipped this question

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

Q18

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