

Washington County Community Foundation

Q1

Our Community Foundation's MISSION STATEMENT:

to improve the quality of life in Washington County by promoting and facilitating philanthropy

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)	No. Not at all.
Family & Individual Philanthropy	Yes. Have been for a while. Doing OK.
Women & Girls' Fund	No. We stopped doing this.
Giving Circles	No. We stopped doing this.
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	Yes. Have been for a while. Doing OK.
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	No. Not at all.
PA EITC	Yes. Have been for a while. Doing OK.
Education / Focus On Our Future	No. Not at all.
Arts, Culture, Heritage / Culture Builds Community	No. Not at all.
Environment / Smart Growth / Sustainability	No. Not at all.
Community Economic Development	No. Not at all.

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. Have been for a while. Doing OK.
Provide nonprofit board member training	Yes. Have been for a while. Doing OK.
Help nonprofits + new potential board members connect	Yes. Have been for a while. Doing OK.
Train & support nonprofit planned giving	Maybe. Considering.
Train & support nonprofit endowment-building	Maybe. Considering.
Other NONPROFIT CAPACITY BUILDING:	financial improvements / lines of credit

Q5

Our community foundation works in these areas of COMMUNITY LEADERSHIP:

Civic engagement	No. Not at all.
Democracy, voting rights, inclusion	No. Not at all.
Community needs assessments / Community report card	Yes. Recently initiated.
Community convening on specific pressing issues	Maybe. Considering.
Diversity, equity & inclusion initiatives	No. Not at all.

Q6

Our Community Foundation #'s:

Year Founded	1995
# Staff FTE	8
# Board Members	25
# Volunteers (not including Board)	15
# Funds	200
Population # in Service Area	210000

Q7

The DENSITY & CHARACTER of our geographic service area is approximately

% Rural	40
% Suburban	40
% Urban	20

Q8

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

\$MILLION Total Assets Under Management	55
\$MILLION Annual Donations/Gifts Received	5
\$MILLION Annual Grants & Scholarships/Paid Out	4
\$MILLION Annual Operating Budget	1

Q9

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

% Donor Advised Funds	37
% Nonprofit Designated Funds	20
% Discretionary Funds	15
% Other Funds	28

Q10

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

% Fully-endowed (invested to last for perpetuity)	85
% Quasi-endowed (invested to spend down within several years)	0
% Provisional/Pass Through (100% granted out, at any time)	15

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)	Yes, a little.

Q12

Our CF's OPERATING budget is @

% Fund Administration Fees	79
% Fees for Services	0
% Fundraising for Operating Programs	10
% Fundraising for Core Programs	0
% Distribution from Operating Reserve	1
% Distribution from Operating Endowment	10
% Other Revenue	0

Q13

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

Crewcial Partners (Colonial Consulting) investment survey

CF National Standards,

CF Insights by Candid,

CF Leads,

PA Community Foundation Association,

Regional Association of Grantmakers

Q14

How our community foundation has fared during COVID:

We've managed through the pandemic, and increased our technology to conduct our work remotely when necessary. We quickly created a disaster and emergency fund and issued over \$1 million in grants which not only addressed the needs of the community, but helped to position us as a community leader.

Q15

What DISTINGUISHES our community foundation from others?

Our relatively small size enables us to pivot quickly, and to perhaps take some risks that a larger foundation might not take.

Q16

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

Receipt and full rehabilitation of a grand historic home where our offices are located on the second floor. The first floor heritage rooms provide for a lovely, family-like setting for donor cultivation.

Q17

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

Gifts of real estate

Creating and maintaining a nature conservancy.

Q18

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