

York County Community Foundation

Q1

Our Community Foundation's MISSION STATEMENT:

To create a vibrant York County by engaging donors, providing community leadership, investing in high-impact initiatives while building endowment 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) | No. Not at all. |
| Next Gen Philanthropists: Millennials (age @21-45) | No. We stopped doing this. |
| Family & Individual Philanthropy | Yes. Have been for a while. Doing OK. |
| Women & Girls' Fund | No. Not at all. |
| 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. We are experts. |
| 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. We stopped doing this. |
| Education / Focus On Our Future | Yes. Have been for a while. Doing OK. |
| Arts, Culture, Heritage / Culture Builds Community | No. Not at all. |
| Environment / Smart Growth / Sustainability | Yes. Have been for a while. Doing OK. |
| Community Economic Development | Yes. Have been for a while. We are experts. |
| Other GROWING PHILANTHROPY: | Racial Equity Fund |

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. Recently initiated |
| 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. Recently initiated |
| Train & support nonprofit endowment-building | Yes. Recently initiated |

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. Have been for a while. Doing OK. |
| Community convening on specific pressing issues | No. Not at all. |
| Diversity, equity & inclusion initiatives | Yes. Have been for a while. Doing OK. |

| | | |
|-------------------------------|------------------------------------|---------------|
| Q6 | Year Founded | 1961 |
| Our Community Foundation #'s: | # Staff FTE | 15 |
| | # Board Members | 21 |
| | # Volunteers (not including Board) | 75 |
| | # Funds | 630 |
| | Population # in Service Area | 430000 |

| | | |
|---|------------|-----------|
| Q7 | % Rural | 50 |
| The DENSITY & CHARACTER of our geographic service area is approximately | % Suburban | 40 |
| | % Urban | 10 |

| | | |
|--|---|------------|
| Q8 | \$MILLION Total Assets Under Management | 210 |
| Our CF's AUM, Gifts in, Grants out, Operating \$, rounded to the nearest Millionth | \$MILLION Annual Donations/Gifts Received | 10 |
| | \$MILLION Annual Grants & Scholarships/Paid Out | 7 |
| | \$MILLION Annual Operating Budget | 2 |

| | | |
|--|------------------------------|-----------|
| Q9 | % Donor Advised Funds | 27 |
| Our @proportion of entrusted FUNDS, by TYPE (product mix): | % Nonprofit Designated Funds | 40 |
| | % Discretionary Funds | 33 |

| | | |
|--|--|-----------|
| Q10 | % Fully-endowed (invested to last for perpetuity) | 99 |
| The TIME HORIZON for our CF's entrusted funds is @ | % Provisional/Pass Through (100% granted out, at any time) | 1 |

Q11

We have experience with

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

Q12

Our CF's OPERATING budget is @

| | |
|-------------------------------|-----------|
| % Fund Administration Fees | 92 |
| % Fees for Services | 4 |
| % Distribution from Operating | 2 |
| Endowment | |
| % Other Revenue | 2 |

Q13

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

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

Q14

How our community foundation has fared during COVID:

Well. Contributions were stable and was able to raise \$1.2 for a COVID Relief Fund. Working remote and onboarding new staff has been good because it has reduced stress on staff while maintaining service but will need to invest this year in staff/team development to maintain and enhance culture of cooperation. Bigger challenges have been conversion to new software and conducting DEI training with staff. These just added more work/stress to a busy team.

Q15

What DISTINGUISHES our community foundation from others?

Self-sustaining from fees. 100% endowed assets. Don't do a giving day. At most leadership tables in the community.

Q16

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

Social Impact Fund to invest in redevelopment projects that revitalize our community and ultimately generate a return. Early Education Fund to provide bonuses to early educators to attract and retain staff at child care centers. Using our voice, our time and resources for ending racial inequities in our community.

Q17

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

Continue to host community indicators project? Building discretionary assets/getting donors excited about community change initiatives.

Q18

Contact info:

| | |
|-----------|---|
| Contact | Jane Conover |
| Position | President |
| Org | York County Community Foundation |
| Addr | 14 West Market Street |
| City/Town | York |
| State | PA |
| ZIP | 17401 |
| Phone | 717-848-3733 |
| E-mail | jconover@yccf.org |
| Website | www.yccf.org |
