



## CF PROFILE SUMMARY:

COMMUNITY FOUNDATION REGIONAL GATHERING PA-NJ-DE-MD-DC

Hirtle Callaghan, Conshohocken PA

Tues. 7.22.25



Materials, Attendance List, Initiative Area Listings:

<https://chescofcf.org/fund/cf-regional/>



Dashboard View of Survey Results (n=11) as of 7/21/25 Online:

[https://www.surveymonkey.com/stories/SM-4WGMRYj\\_2FZxj7fZMbW53HzQ\\_3D\\_3D/](https://www.surveymonkey.com/stories/SM-4WGMRYj_2FZxj7fZMbW53HzQ_3D_3D/)



To Fill Out Survey Online: <https://www.surveymonkey.com/r/2025JULYCFs>



Adams County CF  
Baltimore CF  
Berks County CF  
Carbon County CF  
Chester County CF  
CF of Anne Arundel Cnty  
CF of Howard Cnty  
CF of South Jersey  
Community Giving Fdtn  
Delaware CF  
The Foundation for Delaware Cnty  
Frederick County CF  
Gr Washington CF  
Lehigh Valley CF  
Monroe County CF  
Montgomery Cnty Fdtn  
Philadelphia Fdtn  
Pottstown CF  
Princeton Area CF  
Scranton Area CF

# CF MISSION STATEMENTS

- Our mission is to improve the quality of life for all Carbon County residents, **now and forever**.
- To inspire people and communities to build and distribute charitable funds for good, for Adams County, **forever**.
- CF of Monroe County encourages and facilitates **philanthropic collaboration and growth** to improve the quality of life of Monroe County residents.
- The Lehigh Valley CF **promotes philanthropy** in order to improve the quality of life in our region, encourage collaboration among area philanthropists, and serve as a source of information and expertise regarding charitable giving.
- Our Vision: A fully engaged community working together to **achieve opportunity, equity, and an excellent quality of life for everyone** in Delaware County.  
Our Mission: To ensure an equitable, vibrant future for Delaware County by promoting generosity, inspiring participation and partnership across our communities, and improving the quality of life for all.
- The Montgomery Foundation fosters community growth by managing and distributing funds from public and private sources to support initiatives that address local needs, creating a **lasting impact** on Montgomery County and its residents.
- CF of South Jersey inspires generosity, manages and deploys **permanent charitable assets**, and exercises collaborative leadership to create a more equitable region.
- Launched in 1918, Philadelphia Foundation is one of nation's first publicly supported community foundations and the largest devoted to improving lives in Greater Philadelphia. In our work as a **civic catalyst, trusted partner, and strategic problem-solver, we seek to strengthen the economic, social, and civic vitality of the region**.
- The Scranton Area CF responsibly stewards resources and **inspires transformative philanthropy** to build a strong and vibrant community in NE PA. They achieve this by connecting generosity with local needs through various initiatives and programs.
- The Community Foundation is dedicated to **connecting people who care with causes that matter** to enrich the quality of life in Frederick County **now and for future generations**.
- We connect **people who care with causes that matter**, so their **philanthropic legacies** make a difference **now and forever**.

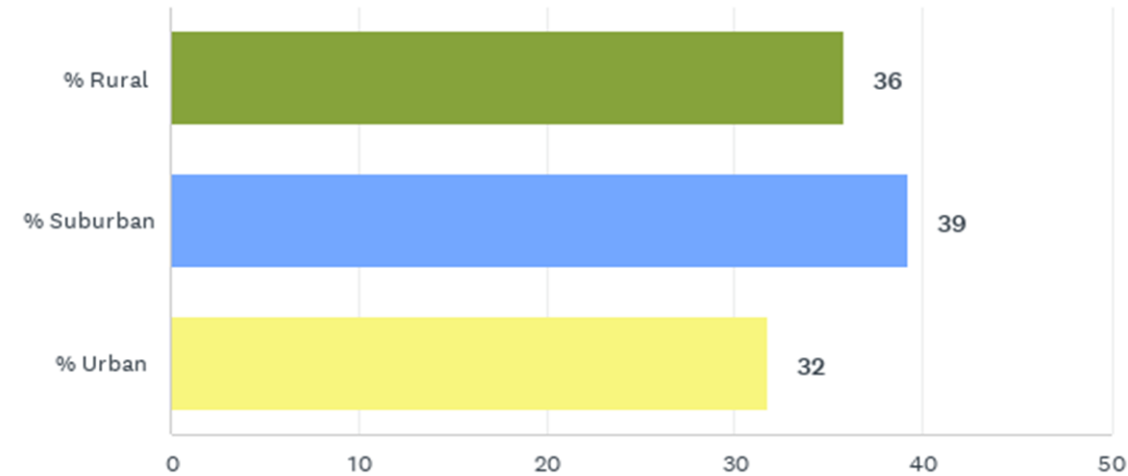


# What DISTINGUISHES Our CF from Others?

- We are truly grassroots, started by local community members because all the counties around us had a community foundation and we didn't. Our founders each contributed \$25,000 to get the foundation started.
- a keen focus on raising unrestricted endowment  
a giving day focused on endowment building  
statewide advocacy to eliminate scholarship displacement, changing PA intestate statute
- In addition to being the top of the mind "go to" resource for philanthropy for individuals, families, and professional advisors, we are a partner in a local funders' collaborative that compiles our annual grantmaking to analyze where we are making impact and where we collectively should place more emphasis to fill gaps.
- We run public health programs and we are a health system conversion foundation.
- As a place-based philanthropic and civic leader, The Philadelphia Foundation can invest, partner, lead, and maintain focus over an extended time horizon. Recognizing these strengths, increasingly we are operating proactively in our civic leadership role – driving attention to issues and bringing capacity off the sidelines.  
We align diverse stakeholders (civic, business, nonprofit, governmental) to amplify impact, making the whole greater than the sum of its parts.  
We believe that providing civic and community leadership is necessary for effective community philanthropy, and that collaborations among free enterprise, the social sector, and government are critical – necessary – to realizing sustainable solutions to our greatest challenges and opportunities.
- The Scranton Area CF stands out for its responsive leadership, collaborative spirit, and commitment to strengthening the nonprofit sector.  
We actively bring together funders, nonprofits, and community members to address urgent and systemic challenges—often serving as both a convener and a catalyst for change.  
In addition to grantmaking, we provide capacity-building support through trainings, technical assistance, and resources that help nonprofit organizations grow stronger and more effective.  
Our ability to adapt quickly while maintaining a long-term vision has made us a trusted anchor institution in NE PA.  
With a strong commitment to equity, innovation, and community voice, the Scranton Area Community Foundation leads with integrity and invests in meaningful, lasting impact across the region.



# The DENSITY & CHARACTER of Our CF's Geographic Service Area is @



Average	36%
Range	0 to 94%

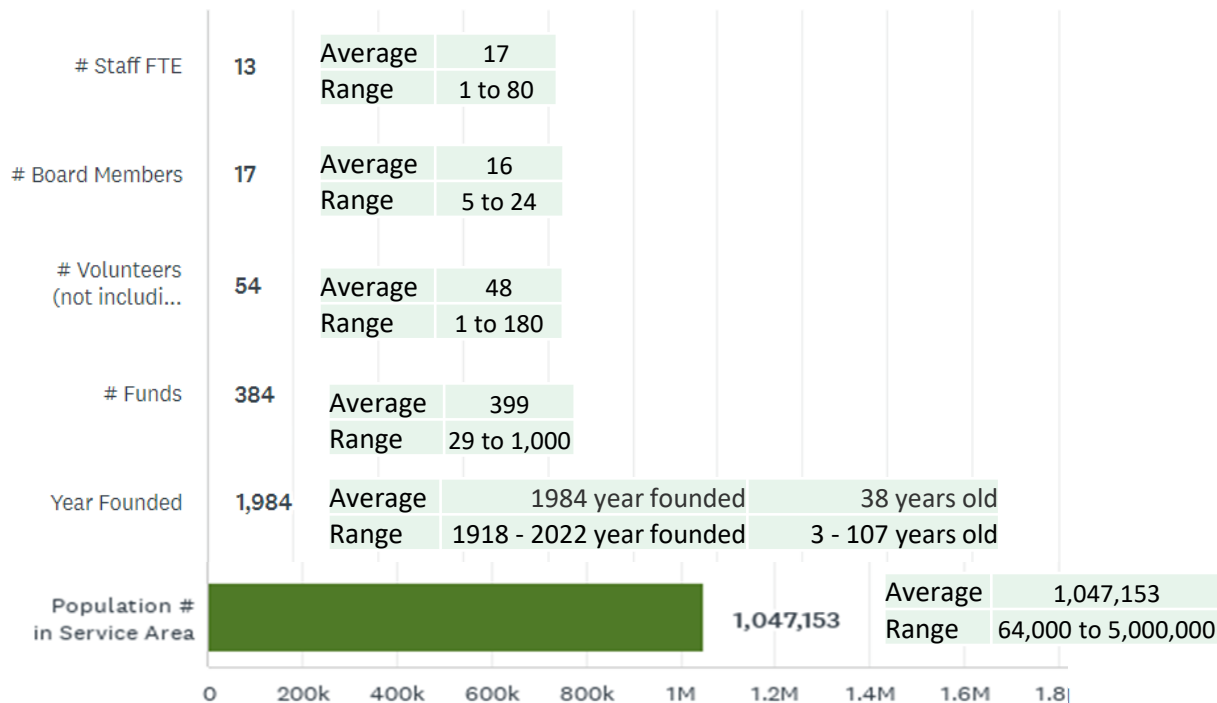
Average	39%
Range	0 to 85%

Average	32%
Range	0 to 90%





## #s OF PEOPLE INVOLVED: Our Community Foundation #'s:



## Collective Nouns for People





## Materials, Attendance List, Initiative Area Listings:

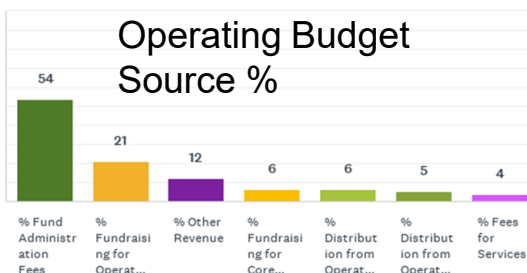
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## Dashboard View of Survey Results:

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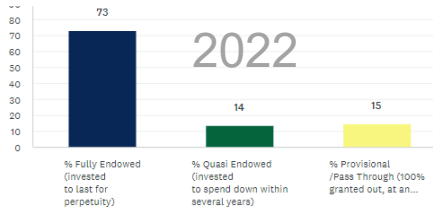
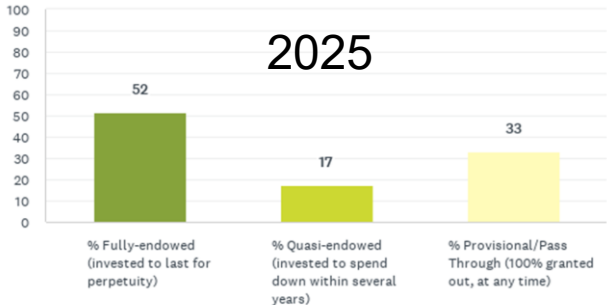


### Operating Budget Source %



			Figures per IRS990/Guidestar	Box L	Line 20	Line 13	Line 15
			URL	Yr Founded	AUM	Grants & Sch	Salaries/Op
Adams County CF	Gettysburg	PA	<a href="http://adamscountycf.org">adamscountycf.org</a>	2007	27M	4M	500k
Baltimore CF	Baltimore	MD	<a href="http://bcf.org">bcf.org</a>	1972	278M	27M	3M
Berks County CF	Reading	PA	<a href="http://bccf.org">bccf.org</a>	1994	135M	5.4M	1.5M
Carbon County CF	Lehighton	PA	<a href="http://Cccfoundationpa.org">Cccfoundationpa.org</a>	2015	2.1M	400k	120k
Community Giving Fdtn	Berwick	PA	<a href="http://csgiving.org">csgiving.org</a>	1998	74M	3.1M	697k
Chester County CF	West Chester	PA	<a href="http://chescofc.org">chescofc.org</a>	1994	132M	6M	1M
CF of Anne Arundel Cnty	Annapolis	MD	<a href="http://cfaac.org">cfaac.org</a>	1998	31M	5.9M	649k
CF of Howard Cnty	Columbia	MD	<a href="http://cfhoco.org">cfhoco.org</a>	1972	35M	1.5M	600k
CF of South Jersey	Haddonfield	NJ	<a href="http://communityfoundationsj.org">communityfoundationsj.org</a>	2007	101M	7M	750k
Delaware CF	Wilmington	DE	<a href="http://delcf.org">delcf.org</a>	1986	346M	45M	2.9M
The Fdtn for Delaware Co	Media	PA	<a href="http://delcofoundation.org">delcofoundation.org</a>	1984	60M	2M	8M
Frederick County CF	Frederick	MD	<a href="http://frederickcountygives.org">frederickcountygives.org</a>	1986	200M	9M	2.5M
Gr Washington CF	Washington	DC	<a href="http://thecommunityfoundation.org">thecommunityfoundation.org</a>	1973	531M	91M	4.5M
Lehigh Valley CF	Allentown	PA	<a href="http://lvcfoundation.org">lvcfoundation.org</a>	1967	110M	9M	1.4M
Monroe County CF	Stroudsburg	PA	<a href="http://cfmcpa.org">cfmcpa.org</a>	2022	730k	10k	14k
Montgomery Cnty Fdtn	Blue Bell	PA	<a href="http://mcfoundationinc.org">mcfoundationinc.org</a>	1960	20M	781k	473k
Philadelphia Fdtn	Philadelphia	PA	<a href="http://philafound.org">philafound.org</a>	1918	872M	63M	6M
Pottstown CF	Pottstown	PA	<a href="http://pottstownfoundation.org">pottstownfoundation.org</a>	1987	74M	2.6M	1.4M
Princeton Area CF	Princeton	NJ	<a href="http://pacf.org">pacf.org</a>	1991	272M	16M	2.6M
Scranton Area CF	Scranton	PA	<a href="http://safdn.org">safdn.org</a>	1997	110M	8M	3M

# HOW FAR ARE WE LOOKING AHEAD? The TIME HORIZON for Our CF's Entrusted Funds is...

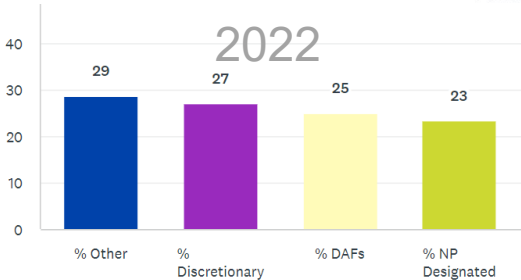


% Fully-ended (invested to last for perpetuity)	% Quasi- ended (invested to spend down within several years)	% Provisional (100% granted out, at any time)	
94	0	6	Adams County CF
1	98	1	Carbon County CF
80	5	15	Chester County CF
80	5	15	CF of Frederick County
41	0	59	CF of Monroe County
58	7	35	CF of South Jersey
1	4	95	Foundation for Delaware County
67	21	12	Lehigh Valley CF
42	3	55	Montgomery County Foundation
52%	17%	33%	AVERAGE 2025
73%	14%	15%	AVERAGE 2022

# WHO DO WE ANSWER TO? Our Proportion of Entrusted FUNDS, by TYPE:



2025

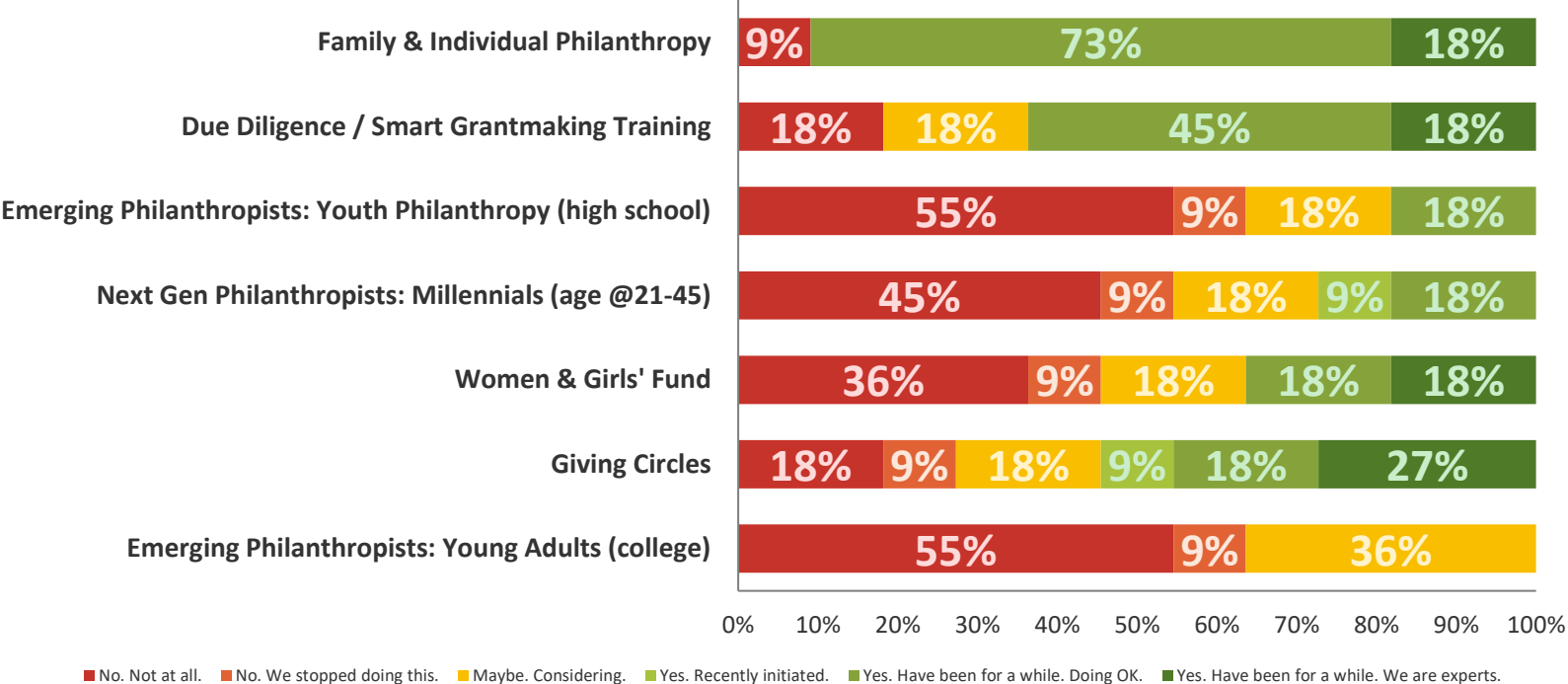


% DAF	% Other	% Scholars	% Discretion	% NP	
15	5	10	40	30	Adams County CF
17	49	29	2	3	Carbon CF
44		7	34	15	Chester County CF
25	25	25	20	5	CF of Frederick County
3	60	34	0	3	CF of Monroe County
89	5	1	1	4	CF of South Jersey
23	36	5	16	20	Philadelphia Foundation
24	29	25	3	19	Scranton Area CF
30%	30%	17%	15%	12%	AVERAGE 2025
25%	29%	x	23%	23%	AVERAGE 2022

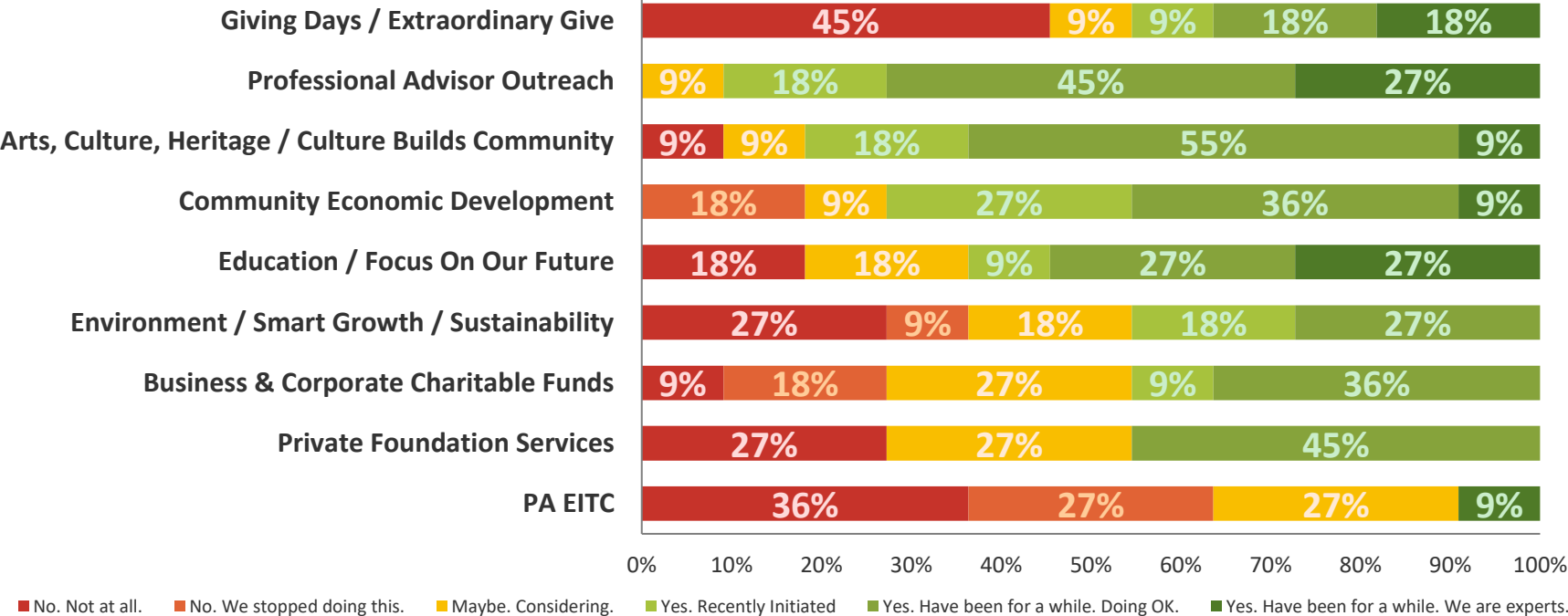




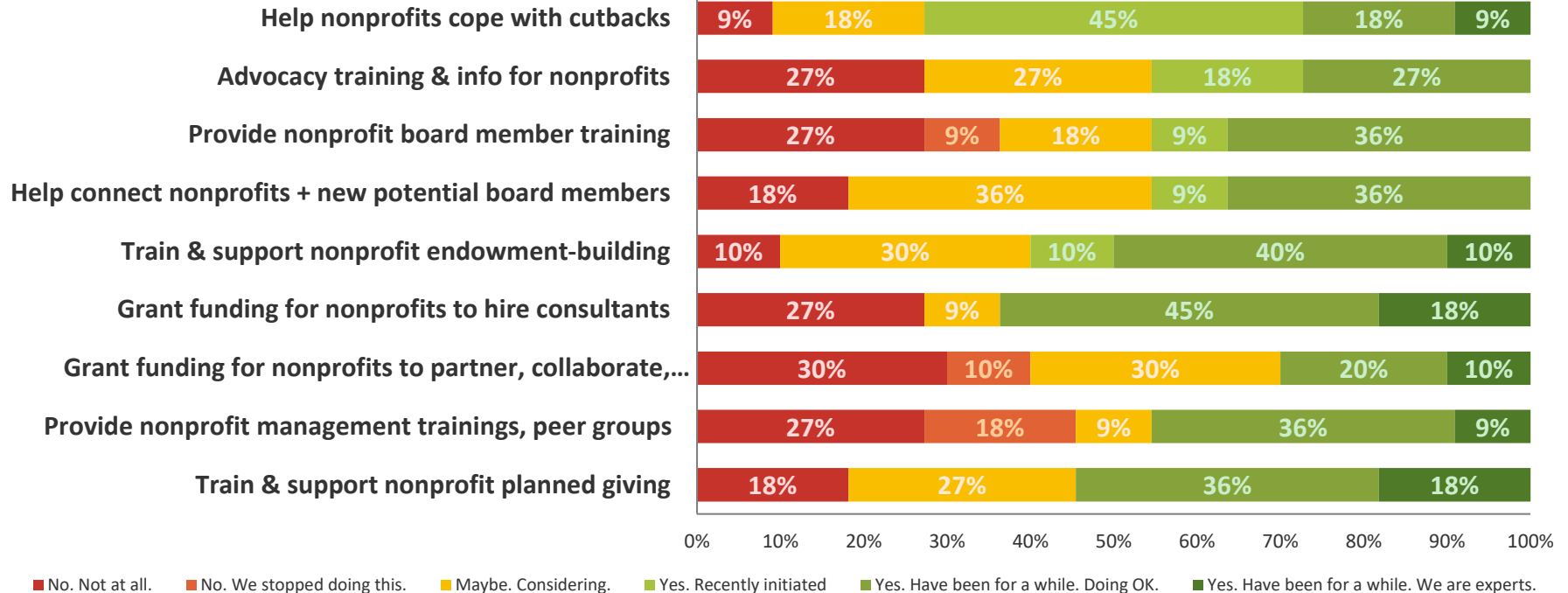
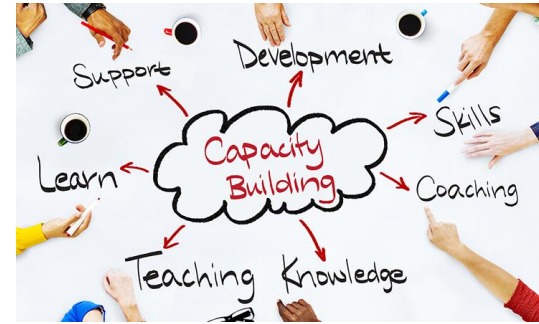
# GROWING PHILANTHROPY: Target Markets & Targeted Offerings



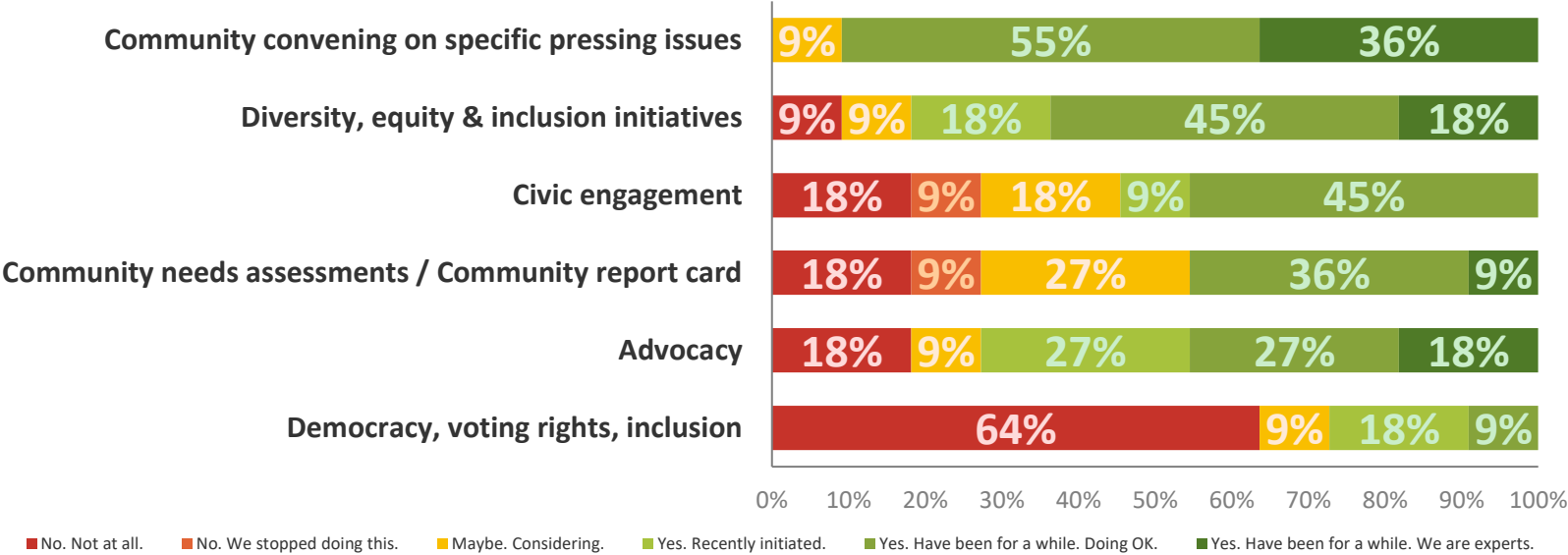
# GROWING PHILANTHROPY: Target Markets & Specialized Field of Interest Initiatives



# STRENGTHENING NONPROFITS: CF Capacity Building Offerings



# CF COMMUNITY LEADERSHIP INITIATIVES:



# CF SPECIALIZED AREAS: Legal & Investment Offerings

Separately Managed Investment  
Accounts/Medallion Investment Partners



Program Related Investments



Socially Responsible Investment  
Offerings/Options (SRI, ESG)



Supporting Organizations

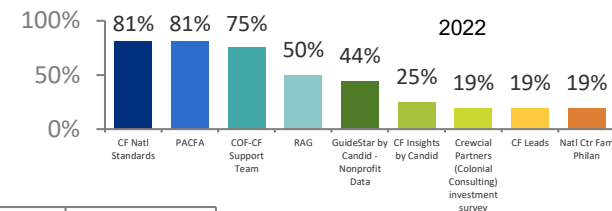
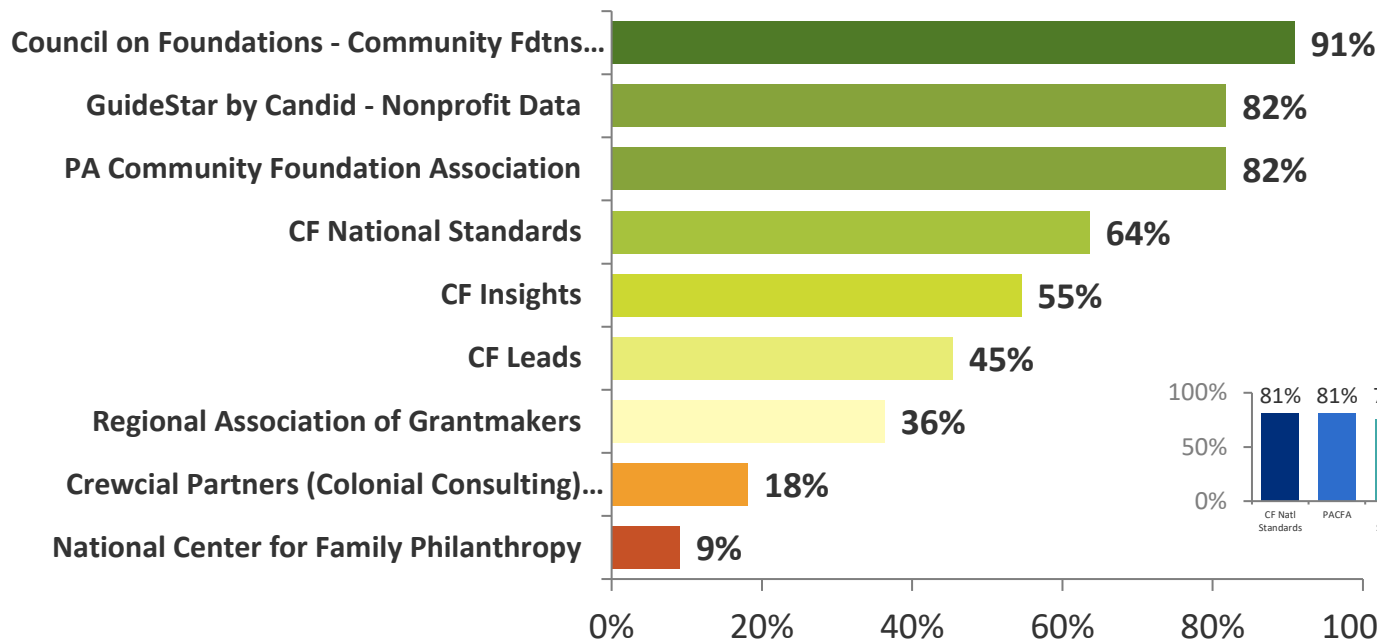


■ None at all. ■ No. We stopped doing this. ■ Maybe soon. Considering. ■ Yes, a little. ■ Yes, a lot.





# WHERE DO WE GET HELP: CF Professional Service Orgs



## CF PROFESSIONAL SERVICE ORGANIZATIONS

Crewcial Partners <https://www.crewcialpartners.com/>

Council on Foundations Community Fdtns Support Team <https://www.cof.org/page/community-foundation-programs-services> | [communityfoundations@cof.org](mailto:communityfoundations@cof.org)

COF National Standards <https://www.cof.org/page/national-standards-us-community-foundations%C2%AE>

CF Insights by Candid <https://cfinsights.candid.org/s/>

CF Leads <https://cfleads.org/>

GuideStar by Candid – Nonprofit Data <https://www.guidestar.org/>

National Center for Family Philanthropy <https://www.ncfp.org/community-overview/community-foundations/>

PACFA Pennsylvania Community Foundation Association [www.pacfapartners.org](http://www.pacfapartners.org)

# Our PROUDEST CF initiatives, triumphs &/or learnings over the past few years



Surpassed \$1M in cumulative grantmaking in June 2024 + we ended 2024 surpassing \$2M in total assets + next year we will celebrate 10 years of community impact.

Completed a \$40 million unrestricted endowment campaign in 18 months.

**Scranton Area CF:** distributed over \$1 million in special grants—twice—to help address inflation-related needs across the region and efficiently administered an additional \$1 million in American Rescue Plan Act (ARPA) funds to support local nonprofits. NEPA Gives, the Foundation’s signature giving day, raised a record-breaking \$1.3 million in just 24 hours in 2025, demonstrating the community’s incredible generosity. Have invested in nonprofit capacity-building by hosting many training sessions and the NEPA Learning Conference, a 3-day conference featuring expert keynote speakers that equips organizations with tools to strengthen their impact.

Through Women in Philanthropy, we have sustained support for programs that uplift women and girls in the region.

On a broader scale, we have engaged in national conversations on workforce and housing challenges, bringing innovative solutions back to NE PA.

We strengthened our role in the animal welfare ecosystem through collaborative efforts with local partners.

In 2024, we celebrated our 70th anniversary and established a permanent home at the historic Century Club of Scranton—a regional hub for philanthropy, collaboration, and community connection.

**Fdtn Delaware Co:** Raised more than \$22M in unrestricted endowment to bolster our strategic grantmaking.

In the process of refocusing our strategic grantmaking in light of the changes in governmental funding streams so that our funding can be more impactful.

Rebuilt our scholarship program to increase internal efficiencies and donor satisfaction in awarding more than \$2M in scholarship annually.

Launched a Sustainable Focus Investment option that has been very popular with fund founders.

Restructuring the staff to increase focus on donor relationships and stewardship.

**Fdtn Delaware Co:** We are conducting a strategic initiative to address teen mental health, that initially we thought would be easy, but soon realized our nonprofit partners were not in sync with each other on how best to meet the needs of the community, so we are learning as we go on this.

Strong trust-based grantmaking program, Delco Gives Day, Center for Nonprofit Excellence, community leadership in maternal health, housing, establishing county health department.

**Phila Found:** Highlight our work related to the **Civic Coalition to Save Lives:** We convened local leaders to hear from renowned public safety researcher and practitioner Thomas Abt about his then-new book, “Bleeding Out,” which made a data-based case for community violence intervention.

In 2021, we convened a core group of local civic, business, and philanthropic leaders to embark on a learning journey – consulting with experts across the country about what they, as non-experts, could do to help to address the issue. The group focused on effective strategies for reducing violence and learned about the importance of harnessing the collective resources of government, business, healthcare, and nonprofits for citywide impact.

After formally organizing into the Civic Coalition to Save Lives, the group offered its assistance to City government in 2022.

The Coalition has worked to strengthen proven intervention efforts, including through grantmaking; foster new partnerships; share vital data; and build a collaborative infrastructure to sustain progress over time and across administrations.

Real results: from 2023 to 2024, homicides dropped over 35%, representing more than 140 lives saved.

As of summer 2024, we achieved the sharpest one-year reduction in gun violence of any large city in the U.S.

We are carrying many of the lessons from the Civic Coalition work – including that government cannot do it alone, the importance of focusing on data-driven strategies, leveraging and coordinating existing assets, and working across sectors – to our new, 10-year strategic focus on increasing economic mobility.

# WHAT CHALLENGES FACE OUR CF? learning from each other / best practices

- ❑ Responding to fast-changing community issues
  - ❑ How do we use our **voice as a community leader**? How do we speak to fundholders and others about this 'new identity'?
  - ❑ Successful projects and programs in community **bridge-building, social justice & civil society**
- ❑ Building **discretionary assets**
- ❑ **Development** and **stewardship** plans
- ❑ Fundraising for **funds** and general **operating** support
- ❑ **Professional advisor outreach & engagement**
  - ❑ Reaching advisors NOT nearby: our donors travel for professional advisory services as there are very few locally
- ❑ **Family philanthropy** best practices and approaches
- ❑ Engaging snowbirds
- ❑ Moving to different **scholarship administration software**: what are others using?
- ❑ How do we do things differently - more efficiently - as **volume increases** and we have **new technology** available to us?
- ❑ IT **Conversion**, from Blackbaud to Foundant?
- ❑ Rising health insurance costs. Considering **self-insuring**. Anyone with experience here?
- ❑ Efficiently managing our **grant process**; how to **build out a team** of program officers with specific content expertise while maintaining a coordinated, holistic, approach to grantmaking
- ❑ Launching a **"Big Gives" Day**





Range	1918 - 2022 year founded	3- 107 years old
Average	1986 year founded	39 years old

**INTROS** in order of CF year founded (starting with **newest** CF) *150 mins/18 cfs = 8 mins each*

- 1 - Highlight 1 or 2 milestones of initiatives of particular significance to our CF**
- 2 - What lies ahead? What challenges/initiatives face our CF?**  
**How have sweeping federal changes impacted our CF?**

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