

*Chester County*  
COMMUNITY FOUNDATION

CONNECTING PEOPLE WHO CARE WITH CAUSES THAT MATTER.

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ANNUAL  
REPORT  
2014

Let your legacy **EMPOWER**  
lives in Chester County and beyond.

*Chester County*  
COMMUNITY FOUNDATION





# COMMUNITY SUPPORT

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Connecting people who care with causes that matter,  
so their philanthropy makes a difference now and forever.



Confirmed in Compliance with National Standards  
for U.S. Community Foundations



# What is the community foundation?

Established in 1994, the Community Foundation builds community assets for perpetuity. The Community Foundation is entrusted with substantial amounts of money over time from the contributions of people of all walks of life. The Community Foundation uses the income from these funds, in the form of grants, to meet the community’s charitable needs now and into the future.

Most of the funds at the Community Foundation are endowed funds--permanent funds that create a sustainable flow of grant dollars forever. Through prudent investment, both the body of the endowment and the distribution available for grantmaking increase over time.

The Chester County Community Foundation has three unique features:

- **local expertise** about important projects and programs that make a significant difference in Chester County
- **personalized service** to donors to help maximize the impact of their contribution; and
- **community convener** for issues that benefit from coordination and/or collaboration.

The Community Foundation strives to be inclusive, innovative, responsive and accountable—providing a clear focus for your inspired philanthropy.





## INSPIRE LEGACY PHILANTHROPY

As we work with families, individuals, businesses and nonprofits to grow legacy philanthropy, our fund advisors and donors continue to be generous. Supporters of the Community Foundation are passionate about the power of philanthropy to address community needs and make positive change. Each day, we are inspired by donors who create legacy funds, giving to the community they know and love.

During this past year:

- the Community Foundation proudly awarded **\$2.3 million** to the community—an increase of 65% from last year. The average grant size increased from \$3,300 to **\$4,300**;
- **20 new funds** were created, bringing the total number of funds to 345; and
- contributions totaled **\$4,463,788** from **2,575** donors.

Since our 1994 founding, **\$29 million** has been awarded via **6,453** grants and scholarships.

During Peter Temple's two-year tenure as Board Chair, the Community Foundation's net assets grew **48%** -- from **\$29.3 million in 2012 to \$43.3 million in 2014**. What terrific growth in philanthropy celebrated at our June Jubilee!

How do we explain such growth? We know that many people who live and work in Chester County have abundant resources, a great deal of generosity, and significant community involvement. Arts, culture, education, human services, health care, and religion are important to the fabric of our community.

We also attribute our substantial growth over the past year to the Foundation's enhanced ability to handle complex gifts; especially complex **planned** gifts. The Community Foundation has evolved institutionally into a charitable organization that provides easy, tax-effective, customized solutions for complex philanthropic estate planning situations.

Each of the Community Foundation's major gifts received in the past year has been related to planned giving and estate planning. In most cases, professional advisors (estate planning attorneys, accountants, financial planners, and investment managers) sought charitable options on behalf of their clients. The Community Foundation provides solutions they need.

We have great hopes for the future. With your help, we connect people who care with causes that matter, so their legacy makes a difference. **FOR GOOD. FOREVER.**

William Gallagher, Esq.  
Chair of the Board, 2014-2016

L. Peter Temple, Esq.  
Chair of the Board, 2012-2014

Karen A. Simmons  
President/CEO



Connecting people who care with causes that matter,  
so their philanthropy makes a difference  
**NOW AND FOREVER.**





# GRANTS & SCHOLARSHIPS

The strength of the Chester County Community Foundation is in its power to change peoples’ lives. Each year, hundreds of organizations—and thousands of people—are touched through the generosity of our donors.

Our donors establish grantmaking funds at the Community Foundation. The majority of grant decisions are made by the families and individuals whose funds the Community Foundation holds in trust. The Community Foundation also grants a modest amount from its Fund for Chester County, based on decisions made by a volunteer Grants Committee. The average grant size increased to \$4,300.

During FY2014, \$2,295,233 in grants and scholarships was awarded to address needs in our community.



523 grants totaling \$2,070,377 and 147 scholarships totaling \$224,855.

Act in Faith of Greater West Chester  
Aidan’s Heart Foundation  
ALS Hope Foundation  
American Cancer Society-East Central Division  
American Diabetes Association  
American Helicopter Museum & Education Center  
Animal Rescue League of Boston  
ARC of Chester County  
Art Partners Studio  
Association for the Colonial Theatre  
Atlantic Salmon Federation  
Avon Grove Library  
Bank Street College of Education  
Barclay Friends  
Barn at Spring Brook Farm  
Barnstone Arts for Kids  
Bayard Taylor Library  
Bethesda Project  
Big Brothers/Big Sisters of Chester County  
Bilingual Education for Central America  
Bishop Shanahan High School  
Bournelyf Special Camp  
Boy Scouts of America, Chester County Council  
Brandywine Baptist Church  
Brandywine Conservancy  
Brandywine Health Foundation  
Brandywine Valley Association  
Bridge Academy and Community Center  
Bridge of Hope of Lancaster & Chester Counties  
Bryn Mawr Presbyterian Church  
Cabrini College

Calvary Chapel of Delaware County  
Calvary Fellowship Church  
Camp Dreamcatcher  
Camphill Special School  
Canine Partners for Life  
Cape-Atlantic Citizens  
Altering the Strays  
Care2 Fund  
Carter Community Development Corporation  
Catawba College  
Catholic Charities Appeal  
Centreville Church of Jesus Christ of Latter Day Saints  
Charles A. Melton Art & Education Center  
Chemical Heritage Foundation  
ChesCo Community Imprints  
ChesPenn Health Services  
Chester County 2020  
Chester County Art Association  
Chester County Chamber of Business & Industry  
Chester County Dept of Community Development  
Chester County Food Bank  
Chester County Fund for Women and Girls  
Chester County Futures  
Chester County Hospital Foundation  
Chester County Public Safety Training Foundation  
Chester County SPCA  
Chester County Women’s Services  
Cheyney Foundation  
Children’s Country Week Association  
Children’s Hospital of Philadelphia  
Christ Community Church

Church in the Vineyard  
Cincinnati Children’s Hospital Medical Center  
Citizens Advocacy of Chester County  
City Gate  
The Clinic  
Community Coalition  
Community Initiatives for Visiting Immigrants in Confinement  
Community Volunteers in Medicine  
Conesus Fest for Charity  
Covenant House PA  
Crime Victims Center of Chester County  
Cure San Filippo Foundation  
Daylesford Abbey  
Delaware Community Foundation  
Delaware County Community College Educational Foundation  
Delaware County Suicide Prevention Task Force  
Delaware Humane Association  
Dickinson College  
Domestic Violence Center of Chester County  
Downingtown Area Senior Center  
Downingtown Library  
Downingtown West High School  
East End Neighborhood Association  
Easter Seals of SE PA  
Episcopal Diocese of PA  
Equine Laminitis  
Evergreen State College Foundation  
Faith Theological Seminary  
Family Lives On  
Family Service of Chester County  
Fenway Health

Fighting Back Scholarship Program  
First Presbyterian Church  
For Pete’s Sake  
Foundation for Lee County Public Schools  
Friends Association for Care & Protection of Children  
Friends Home in Kennett Square  
Friends of East Goshen  
Friends of Oakbourne  
Friends of West Chester Parks & Recreation  
Friendship Ministries Foundation  
Garage Community & Youth Center  
Garage Community & Youth Center West Grove  
Girl Scouts of Eastern Pennsylvania  
Global Aid Network  
Global Media Outreach  
Global Training Network  
Good Fellowship Ambulance  
Good Neighbors Home Repair  
Good Samaritan Shelter  
Good Works  
Great Valley High School  
After-Prom Party  
Greener Partners  
Grossman Burn Foundation  
Growth Ministries  
Habitat for Humanity of Chester County  
Haiti Partners  
Handi-Crafters  
Heifer International  
The Hickman  
Historic Yellow Springs  
Hope Springs Equestrian Therapy  
House of His Creation



Housing Partnership of Chester County  
Interfaith Housing Assistance Corporation  
International Health Services  
International Rescue Committee  
Jenner’s Pond  
Jesuit Center at Wernersville  
Kendal-Crosslands Communities  
Kennett After-School Association-After the Bell  
Kennett Area Community Services  
Kennett Area Park Authority  
Kennett Area Senior Center  
Kennett Education Foundation  
Kennett Fire Company #1  
Kennett Flash  
Kennett Food Cupboard c/o KACS  
Kennett Symphony of Chester County  
Kings Ice Hockey Scholarship Club  
Kiwanis Club of Phoenixville  
La Comunidad Hispana  
Lifeline Family Center  
Lighthouse Youth Center  
Lindblom Math & Science Academy  
London Grove Friends Meeting  
Lord’s Pantry of Downingtown  
Love Maya Foundation  
Lyme Disease Association of SE PA  
Maloto  
Maternal & Child Health Consortium  
Meso Research Fund  
Mill at Anselma Preservation Educational Trust  
Mom’s House  
Montgomery School

Moravian College  
Napa Valley College Foundation  
National Kidney Foundation  
Natural Lands Trust  
New York City Relief  
Norchester Red Knights/Youth Football  
Nurturing Minds  
Open Community Corp/Upattinas School  
Orion Communities  
Oxford Area Neighborhood Services Center  
Oxford Educational Foundation  
Oxford Senior Center  
Paoli Memorial Hospital Foundation  
Parkesburg Library  
Partners in Outreach  
Peacemaker Center  
Peirce College  
Pennsylvania Bible Society  
Pennsylvania Home of the Sparrow  
People’s Light and Theatre Company  
Petra Community Housing  
Philabundance  
Phoenixville Area Children’s Learning Center  
Phoenixville Area Middle School  
Phoenixville Area Police Athletic League  
Phoenixville Healthcare Access Foundation  
Phoenixville Public Library  
Phoenixville Youth Babe Ruth League  
Planned Parenthood of SE PA  
Police Athletic League of Philadelphia  
Pottsgrove School District  
Pottstown Cluster of Religious Communities  
Primitive Hall Foundation  
Priority One Foundation  
Quaker City Farmers  
Rainforest Alliance  
Membership Program

Redeem the Vote  
Resources for Human Development  
Riddle Health Care Foundation  
Rotary Club of Churchville Foundation  
Russell Byers Charter School  
Safe Harbor  
Saints Philip & James  
Salvation Army of Greater West Chester  
Salve Regina University  
Samantha Lee Zajac Adapted Dance Camp  
SE PA Autism Resource Center  
Self Help Africa  
ServeNow  
Sisters of the I.H.M.  
Snow Scientific Research Foundation  
Southern Chester County Day Care Association  
Spartan Foundation  
Special Olympics PA/Chester County Program  
St. Bernard’s School  
St. Mary’s Franciscan Shelter  
St. Peter’s Lutheran Church  
Stroud Water Research Center  
Thirteen/WNET  
Thorncroft Equestrian Center  
Tower Foundation of San Jose State University  
Transition Dynamics  
UCLA Foundation  
United States Para-Equestrian Association  
United Way of Chester County  
United Way of SE PA and NJ  
University of Wisconsin Foundation  
Upland Country Day School  
Valley Forge Deanery  
Valley Youth House  
Vetri Foundation for Children  
Volunteer English Program  
Washington Gorge Action Programs  
The Wentworth

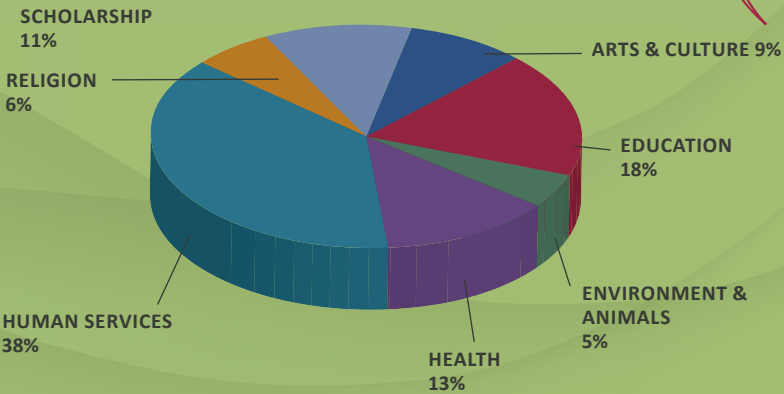
West Chester Area School District  
West Chester Area Senior Center  
West Chester Downtown Foundation  
West Chester Parks and Recreation  
West Chester Public Library  
West Chester University Foundation  
Wetlands Institute  
Wharton Esherick Museum  
WHYY Channel 12 PBS TV  
Wilderness Society  
Wildlife Conservation Network  
William Alanson White Institute  
Willistown Friends Meeting-Educational Fund of the Trustees  
Willistown United Methodist Church  
Wings for Success  
Wistar Institute  
Woman’s Club of Downingtown  
World Vision  
YMCA Brandywine Valley  
YMCA Jammersville  
YMCA Kennett Area  
YMCA of Greater Brandywine  
YMCA Phoenixville Area/Freedom Valley  
Young Life Liberty Region  
Young Life of Richmond-West End  
Young Life Southern Counties

Due to space limitations, grants over \$350 are listed.



## CCCF GRANTS & SCHOLARSHIPS DISTRIBUTED = \$2,295,233 7/1/13-6/30/14

To obtain grant and scholarship guidelines, contact the Community Foundation (610) 696-8211 grants@chescof.org www.chescof.org





# LEGACY PHILANTHROPY AWARDS

Philanthropy =

“active efforts to promote human welfare as manifested in donations of money, property, or work to needy persons or to socially useful purposes.”

## SPECIAL ACHIEVEMENT AWARD: 90/60 honoring 90 years of age and 60 years of business

### The Honorable Dr. Clifford E. DeBaptiste

The Community Foundation spotlights the Honorable Dr. Clifford E. DeBaptiste as he celebrates two milestones this year:

- He was born on May 18, 1924.
- He opened the DeBaptiste Funeral Home on September 12, 1954.

**90 years of age and 60 years of business:** hence, the 90/60 Special Award.

#### The young Clifford first visited West Chester in the 1940s.

This began a lifetime love affair with the town, and he vowed to return and open up his own business. In 1954, after serving in the U.S. Army, graduating from mortuary school, and marrying Inez Manning, they opened the DeBaptiste Funeral Home in the borough. The business prospered. They opened a larger facility during the Great Blizzard of January 1965 at 25 South Worthington Street, where it remains to this day.

#### “Uplifting life through service” is Dr. DeBaptiste’s credo.

He is widely known for his business acumen, civic leadership, religious guidance and community philanthropy. Four years after his beloved wife Inez passed away, Dr. DeBaptiste took office as West Chester’s first African American Mayor. He served two incredibly successful terms from 1994-2002.

#### Dr. DeBaptiste’s good deeds go far beyond West Chester.

He has been honored by the NAACP for his business leadership. In 2009 Dr. DeBaptiste was recognized by the National Purple Heart Association for his service in the U.S.

Army during the 1940s and in the Korean War. In 2014 Dr. DeBaptiste was coronated a Sovereign Grand Inspector General, which is the Thirty-Third and last degree in Ancient and Accepted Scottish Rite of Freemasonry.

A member of numerous local, county, state and national funeral director associations, Dr. DeBaptiste was appointed by the governor to the Pennsylvania State Board of Funeral Directors which he chaired for 13 years.

**Education is the focus of Dr. DeBaptiste’s philanthropic commitments.** A long-time supporter of West Chester University, he served as a member of the Council of Trustees from 1968 to 1972 and as a board member of the West Chester University Fund. In 1991, he was awarded the President’s Medallion for Service, and in 1999, he received an honorary doctorate of public service.

In 2014, Dr. DeBaptiste made a lead donation to kick off a successful fundraising campaign spearheaded by the University’s Frederick Douglass Institute. The Institute commemorates the former slave, distinguished orator, author, abolitionist, and statesman who delivered his last public lecture on West Chester’s campus in 1895.

In addition, Dr. DeBaptiste has granted scholarships to countless students through his charitable funds at the Community Foundation and from his personal resources.

**Uplifting lives through service...for now and forever.**



**Vanguard®**

## CORPORATE SOCIAL INVESTMENT AWARD highlighting business and social responsibility

### The Vanguard Crew

The Vanguard Crew’s willingness to dedicate time, talent and treasure through a wide variety of activities is truly inspiring.

Headquartered in Valley Forge, Vanguard is one of the world’s largest investment management companies. Vanguard employees, called “crew members” have created a culture of social engagement and made a valuable and long lasting connection with their surrounding communities.

Vanguard’s service efforts demonstrate the philosophy of community engagement and philanthropy at work. The Vanguard Crew has an extensive connection to United Way, particularly through its annual fundraising campaign. The workplace giving campaign resulted in over \$6.1 million in donations from Crew members to the United Way. This makes Vanguard the United Way’s largest corporate contributor in the Philadelphia region.

Some other Vanguard Crew volunteer activities include, but are not limited, to:

- **My Classroom Economy**, a program that creates an economic microcosm in the classroom for Grades K-12
- **Skills Based Volunteer Program**, designed to match community needs with personal interests and skills of individual Crew members

- **All Cans On Deck**, a major food drive that helps feed families in need through partnerships with local food pantries

- **Volunteer Time Off**, a program that gives Crew members a paid day off each year to volunteer in their communities any way, any time and any place they would like.

Possibly one of the Vanguard Crew’s most visible demonstrations of giving back and making a long lasting impact is the Vanguard Community Garden. To bring this garden to life, crew member volunteers teamed up with Triskeles Foundation as part of its Food For All project. Together they installed 21 raised garden beds, a water cistern, a compost pad, a tool shed, and a deer fence on its Malvern campus. With 180 volunteers, Crew members (on their own time), plant, maintain, harvest and distribute over 90% of what is grown to local food banks. In its first year, Vanguard Crew volunteers donated 425 pounds of fresh produce.

Vanguard Crew volunteers demonstrate creativity, enthusiasm and generosity around how a corporation can foster an environment where employees make a significant voluntary difference, enriching the quality of life in our communities for people from all walks of life.



## THANKS FOR CARING AWARD

*honoring outstanding commitment to neighborhood,  
grassroots community philanthropy*

### Miguel Alban of Kennett Square

Since coming to the U.S. in 2005, Miguel Alban has been determined to embrace all that America has to offer including learning to speak English and pursuing the 'American Dream'. When asked to give his own explanation of the 'American Dream,' Miguel describes it as being willing and able to give back to the community.

**With passion and drive, Miguel has been instrumental in bridging the gap between the Angelo and Latino communities.** He does this via his professional career, his acts of service, and his charitable giving.

Miguel serves the community by not only donating time and capital, but also talent. Both professionally and voluntarily, Miguel provides bilingual and bicultural services. He educates Latinos in finance areas, including how to shop for the best loan and interest rates. He helps individuals and business owners avoid scams and deal with immigration issues. Through SCORE, Miguel regularly provides workshops on how to succeed as a Latino business owner. With his help, Latino business owners have been empowered to strengthen their businesses, and to give back to the community as well.

Since 2010, Miguel has served on the Board of Directors of La Comunidad Hispana. In 2013, he joined the Board of Directors of the Southern Chester County Chamber of Commerce.

As a volunteer with The Garage Community & Youth Center, Miguel's advice and counsel helps the organization better serve the Latino community, which makes up over 55% of The Garage's clientele. To help with constituent building and fundraising, Miguel brought a dozen new donors to The Garage's West Grove and Kennett Square banquets. Miguel helped raise awareness and participation in The Garage's Holiday Auction; revenue increased by 150% from the previous year.



It is inspiring to note that when Miguel arrived in the U.S., he didn't speak much English. He arrived with his B.A. from University of Piura in Peru and a tremendous amount of energy. Determined to embrace all that America has to offer, he immediately started bagging groceries at a supermarket and worked as a sales clerk at CVS. Miguel also taught Spanish part-time at Bishop Shanahan High School, Cabrini College, Immaculata College, Villanova University and West Chester University. As he learned the English language, he earned a Master's degree in international law from Temple University.

Miguel went on to work at MacElree Harvey, and then at First National Bank of Chester County. He is now with Elite Group serving as Vice President of Avanti Seguros, and the founding owner of Hispanic Approach, LLC. With his law, banking, and insurance experience, Miguel is an extremely well-rounded bilingual, bicultural sales and business development executive.

**Personally and professionally, Miguel is breaking down cultural barriers, forging relationships to support initiatives that will have a lasting impact on generations to come.**

"I want to give back to the Hispanic community," Miguel says. "Hispanics are very hard-working people. They are loyal. I live what they live. I eat what they eat. I dance what they dance. I dream what they dream. I send money to my family back home. The only difference is I'm a professional and I wear a suit and a tie. I just want to help, to give back, and to bridge gaps."

**"We make a living by what we get,  
but we make a life by what we give."** - Winston Churchill



## YOUTH PHILANTHROPY AWARD

*honors young, emerging philanthropists who give time, talent and treasure,  
and inspire others to give*

### West Grove Garage Student Advisory Council

The West Grove Garage Student Advisory Council has been instrumental in successfully growing after-school programs.

Volunteering empowers Council members to recognize that regardless of socioeconomic status and age, everyone has something to give. After a recent project, one member commented, "I realized I like helping people. It showed me I could do more for my community. I can help with my hands, in addition to donating money. I can make a family's home safer to live in and add joy to their lives-and I think that is amazing!"

This group of peer-led philanthropists is composed of 10 middle and high school students from Avon Grove School District. They demonstrate leadership skills and a strong commitment to their community and the mission of The Garage. The Garage offers youth enrichment activities, and tutoring/mentoring for middle and high school students.

Council members meet monthly to identify and coordinate fundraising, community service and outreach events that benefit the Garage and the greater community.

In 2013, the Council raised over \$3,300 to support The Garage's after-school programs through a variety of student-led fundraising activities, such as student dances, a garage sale, and a Cinco de Mayo fundraiser. For each event, the students oversee every detail including

budgeting, marketing, staffing and logistics.

In addition to raising funds for The Garage, the Council coordinates outreach events that help bring new students and families into The Garage, broadening its reach in the community. A Mother's Day Dinner, Community Soccer Festival, packing boxes for Operation Christmas Child, and distributing candy on Halloween are examples of recent outreach activities the Council coordinated and implemented.

The Council recognizes that service projects engage their peers in giving back and builds strong relationships throughout the community. Council outreach projects include:

- volunteering at Jenner's Pond
- sorting and distributing donations at The Bridge Food Pantry and Clothing Closet at the Avon Grove Church of the Nazarene
- tutoring elementary school students at the Charles A. Melton Arts and Education Center in West Chester
- repairing homes with Good Neighbors of Kennett Square.

These students have created a legacy of youth philanthropy. They collaboratively influence change by giving of their own time and resources, and by motivating and inspiring their peers, families and the greater community to give.



DOOR OPENER AWARD

bestowed upon stellar professional advisors who take the initiative to bring legacy philanthropy to the attention of their clients

Louis N. Teti, Esq.

Louis N. Teti, Esq. finds great satisfaction in estate planning. He sees estate planning as a process for people to clarify questions such as, “What is important to me?” and “How do I want to be remembered after I’m gone from this earth?”

Lou explains, “I urge people to really consider what they want their children, grandchildren, and great-grandchildren to know about the values that underscore the decisions made throughout their lifetime. Core values resonate throughout time and help people make sense of their past, present and future.”

Lou adds, “Estate planning includes so many areas: real estate, business succession, tax law, guardianships, family dynamics, bequests, trusts, gifting and philanthropy....all these details weave together to form a tapestry of an individual’s wishes. Too many times, there are so many details that the charitable/philanthropy conversation gets set aside or ignored. But giving to the community is an



Lou has served as President of the Pennsylvania Bar Association (PBA), Chairman of the Disciplinary Board of the Supreme Court of Pennsylvania (on which he served for six years). For over a decade, he represented attorneys in Bucks, Chester, Delaware and Montgomery Counties (Zone 9) on the PBA Board of Governors.

He has also served as Chairman of the PBA Young Lawyers Division, Vice President of the Pennsylvania Bar Foundation, President of the Chester County Bar Association, and President of the Chester County Bar Foundation.

“How do I want to be remembered after I’m gone from this earth?”

important part of many peoples’ lives, so I make sure to directly bring up the charity question, and then give as much or as little time to the legacy philanthropy topic as the client desires.”

Lou has had innumerable legacy philanthropy conversations with clients and colleagues. For over 38 years he has practiced law, concentrating in wills, trusts, business planning, tax planning, contracts, corporate law, real estate law and mediation. A lifelong Chester County resident, he was born and raised in Coatesville and now resides with his family in Downingtown. He is a partner with MacElree Harvey Ltd. in West Chester.

Lou frequently lectures on estate planning, tax planning and estate administration. One of his most popular themes is “Addressing Philanthropy in the Estate Planning Process – Getting the Client Excited About Voluntary Social Capital.”

Lou is also an active community volunteer. He serves as a Trustee at Malvern Preparatory School, and on the Advisory Board of Bishop Shanahan High School. Lou served as Chairman of the Board of the Paoli Hospital Foundation, leading the effort to build the new \$150 million Pavilion at the hospital. He is past President of the Chester County Community Foundation, Central Chester County Chamber of Commerce, the Rotary Club of Central Chester County, and the Rotary Club of Exton-Frazer. He has also served on the Board of the Malvern Laymen’s Retreat League.

Lou’s message is simple, and it explains why he has won the Foundation’s 2014 Door Opener Award: “Learn more about the Community Foundation. It’s an easy, rewarding way to create a charitable legacy and to encourage intergenerational family philanthropy. It would be great if everyone had a donor advised fund at the Community Foundation.”

LEGACY AWARD HONOREES

YOUTH PHILANTHROPY

- 2005 Phoenixville Youth Philanthropy Program
- 2006 Sarah Abel
- 2007 Teresa Hawkins
- 2008 West Chester University Relay for Life Student Organizing Committee
- 2012 Annie Rubino
- 2013 Melissa Christie & Francesca Cintorrino
- 2014 West Grove Garage Student Advisory Council

THANKS FOR CARING

- 2004 Donald J.L. Coppedge of Phoenixville
- 2005 Marvin and Shirley Porter of West Chester
- 2006 Joan Holliday of Kennett Square
- 2006 Emma Valenteen of Phoenixville
- 2007 James Ferrier of West Chester
- 2008 Peg Anderson of Coatesville
- 2009 Reverend Marie Swayze of Phoenixville
- 2010 David Mooberry of Kennett Square
- 2011 Susan Elko of Exton
- 2012 Ophelia Bass, Theresa Bass & LaToya Myers of Kennett Square
- 2013 Elmer Duckinfield of Exton
- 2014 Miguel Alban of Kennett Square

CORPORATE SOCIAL INVESTMENT

- 2004 Richard A. Kunsch for Phoenixville Federal Bank
- 2005 Peter Kjellerup & Mandy Cabot for Dansko
- 2006 Michael Bontrager for Chatham Financial
- 2007 Rose & Angelo Rossi for ANRO
- 2008 J.M. Herr for Herr Foods
- 2009 Jeff March for Citadel
- 2010 Al West for SEI Cares
- 2011 Robert Cottone for IMC Construction
- 2012 Rodney Martin Jr. & Michael Smith for ING U.S.
- 2013 W. Thomas Musser for Tri-M
- 2014 The Vanguard Crew

DOOR OPENER

- 2004 Stephen McGann, CTFA, AEP
- 2005 L. Peter Temple, Esq.
- 2006 Michael B. Karwic, CFP, CRPC
- 2007 David M. Frees, III, Esq.
- 2008 John A. Featherman, III, Esq.
- 2009 Honorable Dr. Clifford DeBaptiste
- 2010 William J. Gallagher, Esq.
- 2011 Duke Schneider, Esq.
- 2012 Robb S. Frees, CIC
- 2013 Richard Clark, CFP®, ChFC®
- 2013 Stephen Olsen, Esq.
- 2013 Timothy Knauer, Esq.
- 2014 Louis N. Teti, Esq.



# JORDAN AWARD HONOREES

The Jordan Award was created in 1999 to honor the longstanding commitment to Chester County philanthropy exemplified by Community Foundation founder Dr. Henry A. Jordan and his wife Barbara McNeil Jordan. Each summer, Jordan Award winners meet to choose the next honoree. Nominations from the field are strongly encouraged, to help the Community Foundation highlight philanthropic good works that significantly improve the quality of life in Chester County.

2000	Elizabeth Ranney Moran of Paoli
2001	Gordon B. Hattersley, Jr. of Berwyn
2002	Aaron J. Martin of Kennett Square
2003	Charles Lukens "Skip" Huston, III of Chester Springs
2004	Penelope "Penny" Wilson of Malvern
2005	David M. Frees, Jr. of Phoenixville
2006	Moirra & Kenneth Mumma of Chester Springs
2007	Eva L. Verplanck, Ph.D. of Kennett Square
2008	Carol Ware, Ph.D. of Christiana
2009	Jennifer & Robert McNeil of Coatesville
2010	The Herr Family of Nottingham
2011	Jacqueline & Martin Clompus of West Chester
2012	Wiggie & John Featherman of West Chester
2013	Albert W. Eastburn of Coatesville
2014	Richard A. Kunsch of Phoenixville

*The Community Foundation accepts nominations for Legacy Awards throughout the year. Decisions are made each summer. Nomination forms are available at (610) 696-8211 or [www.chescocf.org](http://www.chescocf.org).*







Photo Credits: "Gay Street Bridge" by Charles Segal; Colonial Theatre by Patrick Shuck FSX Creative; Phoenixville Healthcare Access.

**DR. HENRY A. AND  
BARBARA M. JORDAN AWARD**  
*significant, longstanding, comprehensive  
philanthropic achievements*

**Richard A. Kunsch, President & CEO,  
Phoenixville Federal Bank & Trust**



**Dick Kunsch has a clear *modus operandi*:** "I want to leave the world better than I found it. I like to get the ball rolling, set examples, and have impact."

Why? **Because Dick Kunsch always remembers his roots.**

**Dick's roots are in hard work.** Dick remembers his father as "a soft-spoken, kind, gentle man who worked hard and long--seven days a week at BFGoodrich." Mom was the tough one. "Though kind, she was the disciplinarian. She worked as a bookkeeper at the local hardware store, as a salesperson at the local bakery, and in medical records at the Valley Forge Army Hospital. Always working so hard, inside and outside our home. That work ethic made an impression on me."

**Dick's roots are also religious.** "My parents were both very religious...Sunday school teachers and choir members most of their lives. As a result, our family activities were centered at church."

**Dick's roots are also community.** "Growing up in Phoenixville, I remember a lot of front porches. People watched over the children of the community. And we had all kinds of people. Phoenixville has always been a melting pot. Iron and steel brought ethnic workers--an extremely diverse group with an incredibly strong work ethic. We all

had to work together, play together, worship together, and respect each other in order to succeed."

But it wasn't simple for Dick. "I didn't know what I wanted to do when I graduated from high school. I went to college for a couple of years, and stopped. Then I worked at Bell Telephone of Pottstown. It was hard work; we were outdoors quite a lot in harsh conditions."

On Fridays, Dick would go to the local bank to cash his paycheck. "One day I decided that it was time to make a change. I realized that I wanted to be that bank teller I saw every Friday. So I went to work at Industrial Valley Bank. Six months later I was offered a position at Phoenixville Federal Savings & Loan Association. What I found was a home and not a job, and I am still there today. I started at the bottom and worked my way up through the banking business. The bank sent me to Philadelphia to banking school. I learned every job, every step of the way. I believe when you do it that way, you're more sympathetic to the needs of all the employees."

As Dick's banking career developed over time, his beloved Phoenixville declined. The 1960s, '70s and '80s took a real toll on Phoenixville. Steel and iron, the Valley Forge Army Hospital and other local manufacturing plants moved out. Phoenixville was declared "dead."



Yet today, as the mythical bird in its name, Phoenixville has risen from its ashes. Phoenixville's lively main street is lined with an ever-increasing roster of shops and restaurants.

The renaissance of the town did not occur on its own. What stimulated the rebirth of Phoenixville? A combination of the right people, in the right place, working together at the right time, joining forces and resources towards a common goal. Though he won't say it directly, those involved in Phoenixville's rebirth agree: Dick Kunsch and Phoenixville Federal Bank & Trust have been at the nexus of Phoenixville magnificently rising from its own ashes.

Dick says, "The rebirth started with the Colonial Theatre. A group of us got together during the 1990s. With hard work, passion, and dedication, we saved the Colonial. When we got its marquee lights on, the Colonial became a beacon in the night. Saving the Colonial paved the way for coffee houses, restaurants, bookstores, parking lots, loft apartments, new businesses...all kinds of economic development happened as an outgrowth of saving the Colonial. Executive Director Mary Foote's passion fuels us, and it keeps us all going strong." That, and Dick's involvement with the Phoenixville Area Economic Development Corporation, the Phoenixville Main Street Program, and the Chester County Redevelopment Authority.

And it wasn't only the Colonial. "We were also fortunate that the 1997 Phoenixville Hospital sale resulted in the formation of the Phoenixville Community Health Foundation (PCHF)." Dick speaks humbly. PCHF is one of Dick's greatest sources of pride. He worked hard to get together the right group of concerned citizens to successfully negotiate. Not once, but twice—first with

University of Pennsylvania Health System, and then with Community Health Systems. After Chairing PCHF, Dick went on to Chair the Phoenixville Healthcare Access Foundation.

**"Healthy people = a healthy economy. It's a simple equation."**

**Dick's roots are in hard work.** Dick is recognized as THE person to turn to when community projects need guidance, leadership, and funding strategies. Dick's influence has been most visible in issues related to community economic development, the creative economy, affordable housing, and health care.

**Dick's roots are also religious and community-based.** Through his leadership, Phoenixville Federal Bank & Trust tithes 10% of its pretax profits to support local community projects. This, coupled with the bank's community loan programs, has empowered many organizations to pursue their own missions for the local good.

"I want to be known as a kind, compassionate person who did not let success spoil me." Dick Kunsch always remembers his roots and where he came from. He continues to spend each day of his life improving the lives of others.





# Funds



The Community Foundation currently is entrusted with **345** funds.

The **20** newest funds are in **colored print**.

The average fund size is **\$125,000**.

Noted after each fund is its inception date.

## CCCCF FUNDS

Adler Legacy Fund Honoring Eva L. Verplanck, Ph.D., 2006  
Annuity Fund for CCCC, 2002  
Anonymous via Charitable Gift Annuity, 2004  
Arts Forever Endowed Fund, 2007  
Benjamin Franklin Trust, 1995  
C4 ChesCo Consultants Collaborative, 2010  
ChesCo Community Imprints Giving Circle, Grantmaking and Operating Funds, 2009  
Chester County Community Foundation Annual Operating Fund, 1994  
Chester County Community Foundation Operating Endowment, 2001  
**Chester County Community Foundation Peer Learning Groups – Executive Directors, Development Managers & Planned Giving Managers, 2014**  
Chester County Community Foundation Youth Philanthropy Program, 2007  
Coatesville Community Health Fund, 1999

Fund for Chester County Environmental Grants Endowment Fund, 2001  
Fund for Chester County Grants Endowment Fund, 1995  
Gettysburg Address Contest, 2004  
Jordan Award Fund, 1998  
Lincoln Building Fund, 1996  
Margaret S. DeVinney Fund, 2011  
Richard I.G. Jones Legacy Grants Fund of the Fund for Chester County, 2007  
West Chester Trust & Relief Fund, 2000  
William & Anne Evans Jr. Endowment Fund, 2010  
YWCA Chester County Scholarship Endowed Fund, 2010

## DONOR ADVISED FUNDS

Anonymous, 2011 (2)  
1002 Fund, 1999  
4kids2C, 2010  
Aaron & Jean Martin Fund, 1998  
Adolescent Awareness Foundation, 2012

Amy Elizabeth Drobish Foundation, 2010  
Andre J. Dupuis Foundation, 2012  
**Anne & Gus Teipelke Charitable Legacy Fund, 2013**  
Anne Stroud Hannum Fund, 1998  
Barney Harahan Memorial Fund, 2002  
Barrie Stavits Foundation, 2002  
**Baxter Family Foundation Endowed Fund, 2014**  
Baylus & Deborah Francis Fund, 2002  
Beccaria Charitable Fund, 2006  
Bugel Family Fund, 1998  
Capacity for Change Fund, 2008  
Carl & Sylvia Landis Foundation, 2012  
Caroline Manning Bolton Legacy Fund, 2002  
Chain of Love Foundation for Turner Syndrome, 2004  
Chase Your Dream Endowed Foundation, 2007  
Chester County Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007

Clay-Mir Charitable Foundation, 2000  
Connor T. Schmidt Foundation, 2001  
Daryl E. & Martha J. Thomas Fund, 2002  
David A. Jackson Legacy Fund, 2005  
DeBaptiste Foundation, 2010  
Di & Dallas Krapf Foundation, 1999  
**Dianne & Dave Elderkin Fund, 2013**  
Diederich Family Foundation, 2007  
Doe Run Charitable Fund Endowment, 2005  
Edward H. & Dorothy K. Dickol Foundation, 2006  
Elizabeth Bove Foundation, 2013  
Emily's Dash Foundation, 2012  
Eugene L. DiOrio Legacy Fund, 2007  
Everett Frank Legacy Fund, 2000  
Farnesi Family Foundation, 2000

Featherman Family Fund, 2006  
Francis J. Snyder Foundation, 2007  
Frees Family Fund, 1998  
Ginger English Memorial Fund, 2007  
Gold Family Foundation, 2010  
Good Fight Foundation, 2005  
Goodnow Fund, 2004  
Harry & Aggie Tyler Can-Do Foundation, 1999  
Heart in Hand Partnership, 2000  
Heather Lynn Drobish Foundation, 2010  
Helen & Paul Breitegam Fund, 2003  
Helen & Robert Whittaker Memorial Trailhead Park Fund, 2011  
Hennigan Family Fund, 2007  
Hockman Family Foundation, 2012  
Hollenbach Family Foundation, 2000  
Hutton Family HeLP Fund, 2000  
I Scream for Elephants Fund, 2011  
Ilex Fund, 2012  
J. M. & Lois B. Herr Family Foundation, 1998  
**Jack C. Griest Charitable Fund, 2013**  
Jeffrey Robert Drobish Foundation, 2010  
Jeremy P. Wilson Foundation, 2010  
Jessie L. & Harold W. Freeman Foundation, 2011  
Joan & William Walkup Family Fund, 1999  
John Eirkson & Kathy Ryan Esq. Charitable Legacy Fund, 2009  
Jordan Family Fund for Chester County, 1998  
Joseph J. D'Amico, Sr. Memorial Fund, 2010  
K & M Fund, 2003  
K9s4kids, 2010  
Kathleen McBratnie Memorial Fund, 2004  
Kelly Ann Foundation, 2013  
Kelly Family Foundation, 2012  
Kenneth W. & Joanne H. Tunnell Fund, 1998

Kevin Holleran Fund, 1999  
Koester Family Foundation, 2000  
Krapf Family Foundation, 1999  
L.E.G. Up Fund, 2007  
Laudenslager Family Foundation, 2011  
Laura Lee Hervey Fund for Traumatic Brain Injury, 2007  
Laura Meikle Koch Memorial Legacy Foundation, 2008  
Leon Andrew Bartley Fund, 2011  
Liddick Family Fund, 2007  
Lockwood Fund, 2007  
Loew Family Foundation, 2007  
M & M Fund, 2001  
Marjorie L. & Arthur P. Miller, Jr. Fund, 1998  
Marvin & Shirley Porter Educational Foundation, 2009  
Michael Jay & Elizabeth Harper Briglia Fund for Catholic Education, 2012  
Moretzsohn Family Foundation, 2000  
Mr. & Mrs. Robert P. Moran, Jr. Family Foundation, 2010  
Nannette & Dale Krapf Foundation, 1999  
**Neil Joines Fund, 2013**  
Newlin Foundation, 2010  
**Next Step Fund, 2014**  
Nick Smiles on the Fine Arts Foundation, 2010  
Niles-Milner Fund for Student Travel, 2004  
Orchard Fund, 2001  
P.G. Thomas Charitable Legacy Fund, 2009  
Patricia C. & John Celii, Jr. Foundation, 1999  
PFF Fund, 2000  
Pink House Fund, 1998  
Power of Positive Thinking Fund, 2009  
Put Your Money Where Your Mouth Is Foundation, 2009  
Quigley Family Fund, 2012  
Raymond M. Moskowicz & Mary Ann Moskowicz Fund, 2009  
Richard & Carolyn Vermeil Foundation, 2009

Richard & Lois Hodgson Fund, 1998  
Rigg Family Foundation, 2011  
Robert & Jennifer McNeil Fund, 2002  
Robert M. Price Memorial Fund, 2004  
Robert Olin Niles Memorial Foundation, 2010  
Robert Wiley Miller Memorial Foundation, 2000  
Ruch Family Foundation, 2011  
Samantha Lee Zajac Memorial Fund, 2001  
Schwartz Family Fund, 2001  
Seeds of Hope Fund, 2007  
Shobaken Family Fund, 1998  
Spot Castle Foundation Fund, 2003  
Spurlino Family Fund, 2006  
St. Ann Rose Fund, 2000  
Stanley's Dream, 2004  
Sunday Foundation, 2012  
Susan Groome Harney Memorial Fund, 2000  
T&G Charitable Trust Endowment, 2005  
Terry Muzzy Foundation, 2007  
Teti Family Fund, 2006  
Trajabay Fund, 2005  
Tres Foundation, 2003  
Tyler Family Fund, 2005  
Valerie Smith Art Fund, 1998  
Vaughan Family Fund, 2000  
**Whitford Quasi Endowed Charitable Fund, 2014**  
Woody's Woods Memorial Fund, 2003  
Zelinda LeBoutillier Charitable Foundation, 2011

**FIELD OF INTEREST FUNDS**  
Champlain Social Ministry Fund, 1999  
Chester County Funeral Directors Association Charitable Fund, 2009  
Friends of Chester County Seniors Fund, 2010  
Fund for Coatesville, 2000  
Happy Romar Fund of Chester County, 2000  
Honorable Dr. Elinor Z. Taylor Foundation, 2005  
International Equine Conference on Laminitis & Diseases of Foot, 2008  
Jim Decker Compassion Ministry Fund, 2002  
John Rock Memorial Fund, 2004  
Parkesburg Environmental Fund, 1998  
Quaker State Funeral Directors Association Charitable Fund, 2009

## FISCAL SPONSOR / FUNDRAISING FUNDS

Chester County Estate Planning Council Fund, 2005  
Decade to Doorways Initiative Fund, 2013  
Equine West Conference on Laminitis & Diseases of Foot, 2010  
Friends of Hershey Mill Dam Fund, 2011  
**Friends of Youth Community Forward, 2013**







Land and Water Resources e-Institute Fund, 2007

Mesothelioma and Asbestos Disease Society Fund, 2004

Oxford Arts & Culture Center Fund, 2011

PA Foundations Online Outreach Fund, 2010

RE/MAX Main Line Charitable Foundation, 2005

Romig Road Victory Run Fund, 2008

Valor Bowl Fund, 1999

West Chester Downtown Foundation Up On the Roof Fund, 2013

**West Chester Walk of Fame Fund, 2013**

Whitford Charitable Fund, 2011

**NONPROFIT-DESIGNATED & ORGANIZATIONAL ENDOWMENT FUNDS**

ACT in Faith Fund, 2012

American Cancer Society Fund, 1998

ARC of Chester County Fund, 2000

Big Brothers/Big Sisters of Chester County Fund, 1998

Bishop Shanahan High School Fund, 2002

Bournelyf Special Camp Fund, 2005

Brandywine Conservancy Lincoln Building Fund, 1999

Brandywine Valley Association Fund, 1998

Camphill Special School Endowment Fund, 2005

Canine Partners for Life Fund, 1999

Chadds Ford Historical Society Fund, 2003

Charlestown Playhouse Fund, 2004

Chester County Art Association Fund, 1999

**Chester County Council of the Boy Scouts of America Fund, 2013**

Chester County Fund for Women and Girls Grants, Operating & SRI Endowments, 2001

Chester County Futures Fund, 1999

Chester County Historical Society Fund, 2007

Chester County Library Fund, 1999

Chester County S.P.C.A. Fund, 2005

The Clinic Fund, 2007

Coatesville Community Education Foundation Fund, 2009

Community Coalition Fund, 1999

Community Gardens of Chester County Fund, 2000

Community Volunteers in Medicine Edgar R. Lawrence, DDS Dental Endowment Fund, 1999

Daemion Counseling Center Fund, 2004

Devereux Foundation Fund, 2008

Domestic Violence Center of Chester County Fund, 2007

Downingtown Educational Foundation Fund, 2000

Downingtown Works Fund, 2001

Easttown Library Foundation Fund, 2011

Family Service of Chester County Fund, 2008

French & Pickering Creeks Conservation Trust Endowed Fund, 2013

Friends of Anson B. Nixon Park Fund, 1999

**Friends of West Chester Parks & Recreation Endowment Fund, 2014**

Good Works Fund, 2002

Gordon B. Hattersley, Jr. Fund for Community Volunteers in Medicine, 1999

Great Valley Nature Center Fund, 2002

**Greater West Chester Rotary Foundation Fund, 2013**

Habitat for Humanity of Chester County Fund, 2002

The Hickman Fund, 2004

Home & Farm Antique Association Fund, 2000

Jenner’s Pond Resident Fund, 2001

John H. Phillips III Memorial Fund for Horseshoe Scout Reservation, 2000

Kennett Area Senior Center Fund, 2000

Kennett Symphony Children’s Chorus Fund, 2010

Kennett Symphony of Chester County Fund, 2006

Kerr Memorial Park Fund, 2010

Kiwanis Club of Phoenixville Fund, 2001

**La Comunidad Hispana Endowed Fund, honoring Margarita Quiñones, Mary Flores, Peggy Harris & Shelly Tucker, 2013**

**Land Conservancy for Southern Chester County Endowment Fund, 2014**

**Land Conservancy for Southern Chester County Land Endowment Fund, 2014**

Lions Club of Kennett Square Fund, 2001

Lundale Farm Endowment Fund, 2013

Margaret E. Coppedge Memorial Fund to Benefit Grimes AME Church, 2005

Maternal & Child Health Consortium of Chester County Fund, 1998

Mill at Anselma Preservation and Educational Trust Fund, 2003

Parkesburg Free Library Fund, 1996

Pennsylvania Home of the Sparrow Fund, 2006

Phoenixville Community Education Foundation Fund, 2006

Phoenixville Public Library Foundation Fund, 2005

Planned Parenthood of SE PA Fund, 1995

Primitive Hall Fund, 1996

Priority One Foundation Fund, 2004

Quest Therapeutic Services Fund, 2011

S.A.V.E. Legacy Endowment Fund, 2010

Samuel Barber Foundation Fund, 1998

Spackman-Holleran Fund for United Way of Chester County, 1998

Stroud Fund for Water Research Fund, 1997

Thorncroft Fund, 2000

United Way of Southern Chester County Fund, 2004

Upper Main Line YMCA Fund, 2000

W. Marshal Schmidt Fund for Childrens’ Country Week Association, 1998

Walden School Fund, 2001

West Chester Area Senior Center Fund, 2004

West Chester Downtown Foundation Fund, 2004

West Chester Friends School Fund, 2006

West Chester University Library Fund, 1998

West Goshen Lions Club Fund, 1998

Wharton Esherick Studio Preservation Fund, 2001

Wharton Esherick Studio Site Maintenance Fund, 2011

Wharton Esherick Studio Woodworking Award Endowment Fund, 2012

William S. West H.O.P.E. Memorial Fund for Petra Community Housing, 2000

Willistown Conservation Trust Endowment Fund, 2013

Woman’s Club of Downingtown Fund, 2003

YMCA of the Brandywine Valley Fund, 1999

Youth Suicide Prevention Task Force of Chester County, 2005

**SCHOLARSHIP FUNDS**

Alice Lawson Scholarship Fund, 1998

Alice M. Thomas Scholarship Fund, 1998

Bradley Hughes Foundation, 2009

Brett Mickens Scholarship Fund, 2012

Brianne Carter Memorial Fund, 1999

Carl O. Benner Scholarship Fund, 2001

Carl Schnellenbach Wrestling Scholarship Fund, 2001

Caroline Gallagher Cranston Memorial Scholarship Fund, 2011

Charles A. Melton Scholarship Fund, 1999

Charles R. White Scholarship Fund, 1999

Chester County Estate Planning Council Mark Riddell Memorial Scholarship Fund, 2011

Coach Millard Robinson Memorial Fund, 2001

Constance & Michael Briglia Memorial Foundation, 2006

Dana Marie Carr Memorial Scholarship Fund, 2000

Dr. Alan G. Elko Legacy Scholarship Fund, 2008

Dr. Elaine Kirkland Scholarship Fund, 2011

Dr. Gerald E. Clark Memorial Scholarship Foundation, 2008

Dr. John H. Hewlett, III Scholarship Fund, 1999

Dr. W.T.M. Johnson Memorial Foundation, 1999

Drew McWilliams, Jr. Scholarship Fund, 1998

East End Neighborhood Association Scholarship Fund, 2009

**Eleanor & James Latta, Jr. Scholarship Fund, 2013**

Elizabeth G. Dorsett Memorial Scholarship Fund, 2001

Eugene J. & Mary DiFilippo Scholarship Fund, 1999

Front Porch Trust Scholarship Fund, 2005

George W. Martyn, Jr. Scholarship Fund, 2000

Halliday Clark, Sr. Memorial Scholarship Fund, 1998

Harry Dunn Art Scholarship Fund, 2001

Janet P. Shaner Memorial Scholarship Fund, 2006

Jeffrey A. Wheet Memorial Scholarship Fund, 2011

Jeffrey S. Gaunt Memorial Scholarship, 2008

John & Mary DiCecco Scholarship Fund, 1999

John Hay Memorial Scholarship Fund, 2010

Joseph J. D’Amico, Sr. Memorial Fund, 2010

Josiah Hibberd Scholarship Honoring Margeretta Durnall Hibberd, 2013

Julius “Bud” & Dorothy Elberfeld Foundation, 2010

**Kappa Psi Pharmaceutical Fraternity ETA Chapter Legacy Fund, 2013**

Karen L. Mapes Memorial Scholarship Fund, 2013

Karrlin Field Memorial Fund, 2005

Kennett High School Scholarship Fund-Anonymous Bequest, 2009

Koreem Bell Scholarship Fund, 2011

Laura Meikle Koch Drexel University Scholarship Foundation, 2008

Lauren’s Heart Scholarship Foundation, 2011

Leon Bell Scholarship Fund, 2011

Longwood Rotary Club: Scott Thompson Special Assistance Scholarship, 2008

Lucinda P. Wallace Memorial Scholarship Fund, 2002

Madalene Hayes Conner Scholarship Fund, 2003

Maria Whitehead Memorial Scholarship Fund, 2010

Maurice E. Warrick, Jr. Memorial Education & Scholarship Fund, 2004

Mayor Clifford E. DeBaptiste Scholarship Foundation, 1998

Michael G. Maybroda Memorial Fund, 2005

Natalie A.W. Leaf Charitable Trust, 2001

Newlin Foundation Scholarship Fund, 2012

Nicholas R. MacElree Scholarship Fund, 2005

Patricia B. Dixon Scholarship Fund, 2009

Paul Hassenplug Scholarship Fund of the Rotary, 1999

Peoples First Scholarship Fund, 2004

Quaker City Farmers Scholarship Fund, 2001

Raymond Montoni Music Scholarship Fund, 2001

Rev. William J. Fischler Memorial Cursillo Scholarship Fund, 2007

Richard S. Hodgson Scholarship Foundation, 1999

Robert & Doris Hanna Scholarship Fund, 2003

Rotary Club of Coatesville Scholarship Fund, 1998

Ruch Family Foundation Endowed Scholarship Fund, 2011

Schramm Foundation Fund, 2005

Stanley’s Dream Scholarship Fund, 2004

Stephen Chandler Ericson Scholarship Foundation, 2011

Susan DeCecco Scholarship Fund, 1999

Susan Romano O’Brien Science Scholarship Foundation, 2009

Sweet Jane’s Wish Foundation, 2012

Teresa V. Garofalo VMD Memorial Scholarship Fund, 2011

Terry Muzzy Foundation, 2007

Thorndale Rotary Jay Edge Community Service Scholarship, 2009

Vicky Ahlum Memorial Scholarship Endowed Foundation, 2006

West Chester B. Reed Henderson High School Class of 1953 Scholarship, 2008

West Chester Optimist Scholarship Fund, 2011

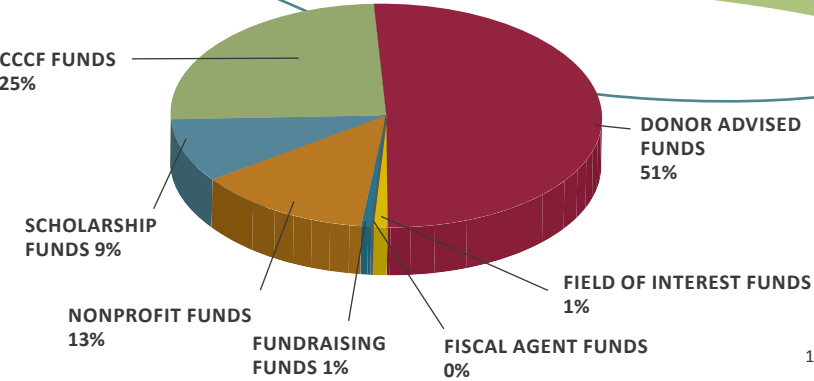
William M. Taylor Memorial Scholarship Fund, 2004

William’s Wish-The William Vincent Memorial Scholarship Fund, 2008

Your Part-Time Controller Excellence in Accounting Scholarship, 2005

**CCCF FAMILY OF FUNDS % OF ASSETS**

To create your legacy fund, contact Donor Services at (610) 696-8045 or [info@chescofcf.org](mailto:info@chescofcf.org). The minimum contribution to establish an endowed fund is \$25,000. The average endowed fund size is \$125,000.







## PATRICIA C. & JOHN CELII, JR. FOUNDATION

*established 1999*



Patricia A. Cloud  
626 E. Cypress St.  
St. Patrick, Kennett Square  
Art may claim this cordial  
senior if she persists in becom-  
ing a commercial artist.



John J. Celli  
221 W. Lancaster Ave.  
St. Joseph, Downington  
Although he appears to be  
passive, John stores a supply  
of energy for unexpected hap-  
penings.

- He was on the baseball team...She was his cheerleader.
- He was from Downington...She was from Kennett.
- He was from a small family...She had relatives too numerous to count.
- He was a “class clown” whose mother begged Reverend Kehoe to accept him at Bishop Shanahan High School and to “straighten him out”...She was a diligent student and volunteer church organist, who later discovered that the Shanahan nuns yearned to recruit her to the Sisterhood.
- In his senior year book, his friend Buddy noted, “If you ever succeed in life it will be a surprise to me.”... In hers, it said, “Art may claim this cordial senior.”
- Opposites attract...It has been an incredible journey.

**Much has happened to John and Pat Celii** in the five decades since their 1961 graduation. True to Bishop Shanahan’s school motto, together they **“seek the things that are found above”** in a variety of facets. “Life is about risk---strategic, calculated risk,” intones John Celii. Adds Pat, “It’s also about family...having an incredibly strong support system so that you can take chances, and share the rewards if they come your way.” “Fortunately, the rewards came our way,” explains John, “because we’re lucky. Damn lucky. However, we made many sacrifices and worked hard to make that luck happen.”

**John and Pat finish each other’s sentences.** They seem to read each other’s mind. It is clear that these high school sweethearts are still very much in love after five decades. They live in a gorgeous 19th century gentleman’s farmhouse restored by the best architects and builders around. Lovingly decorated by Pat, her flair for artistic design shows in every nook. And their philanthropy is inspiring. “Philanthropy began with restoring our home,” jokes John. “And it readily extended to the community around us,” explains Pat.

**Of course it wasn’t always easy.** After the high school sweethearts married in 1962, they lived in the tiniest apartment in Downington. John toiled at night school earning his BS in Accounting and Finance at St. Joseph’s University while working full time. John left home by 7 a.m. and returned after 11:30 p.m., while Pat raised their two beautiful daughters, Jacqui and Stephanie. “I often wonder how we made it work,” remarks John. “Family,” answers Pat knowingly, “The kindness of grandma and our parents. And lots of patience...a strong sense of deep commitment...and dreams...and taking chances...and hard work.”

**“Yes...family....Thank God for my mother in-law,”** laughs John. “She paved the way to get me a first interview which turned into an extremely successful 20 year career.” John first worked in Avondale at F&M Scientific, just as Hewlett-Packard Co. acquired it from Frank Martinez, Aaron Martin and Gene Bennett. “It was a terrific experience...being on the ground floor of a strategic move like that.” Soon after, Hewlett-Packard recognized John’s natural-born talent, work ethic, and hands on experience. “Moving to HP’s corporate headquarters in Palo Alto, California at the dawn of the computer industry was huge!” exclaims John.



**John traveled extensively for business**, coast to coast many times over, delving into both Finance and Marketing with Hewlett-Packard. John went on to become VP of Finance and CFO at 3Com Corporation, then headed up Mergers & Acquisitions at Convergent Technologies, and served as President of Convergent Dealership Systems. “I rarely saw the family. I was on the road so much. I knew that Pat was raising our daughters almost single-handedly. But I loved the thrill and the pace and being in on the ground floor while the computer industry was developing in Silicon Valley in the 1980s, and Pat knew that.”

**“I could see how much he thrived...there was no stopping him.** We missed him terribly, but he was so, so good at what he was doing. We had to help him live his career dreams,” Pat adds wistfully. Sometimes the family lived on the East Coast. Sometimes on the West Coast. Sometimes on both coasts, simultaneously. “We did what was right for the family, for each of us, and the kids. They were great years; and at the same time, they were very trying years.”

**Finally they had enough.** John retired in 1990 at age 48 and “relaxed a spell.” “If you can call it ‘relaxing,’” jokes Pat. John spent the next three years in Chester County with his family. His days were filled with fishing, collecting cars, and playing high stakes poker. John created his Standardbred Racing enterprise--the one that fostered their pride and joy, Badlands Hanover. “Badlands was a world champion Standardbred racehorse, and is now a very successful sire. It’s a thrill to own such a gorgeous, strong, powerful animal.”



**Out of the blue in 1993, the corporate world came calling.** “It was a startling offer, and we said ‘no’ right away. But the recruiter circled back a few more times and wouldn’t quit. So we set forth a ridiculously steep set of conditions to chase them away .... and to our surprise, they were met.” After much heart-felt conversation, John re-entered corporate life as CFO of a start-up company, Grand Junction Networks. The high-stakes, calculated gamble paid off. Grandly. Grand Junction was eventually acquired by Cisco Systems, and John headed up Cisco’s East Coast merger and acquisition team.

**In 1998, John retired for the second and final time.** He and Pat settled back in Chester County, at long last, together full-time.

**In 1999, Pat began a massive restoration** of their newly purchased 1839 historic Chadds Ford home, “Keepsake.” She strove to protect the home’s historic and architectural qualities, yet fill it with modern amenities. The project involved restoration of the original 1836 house, reconstruction of the 1850s smokehouse, construction of a major addition, a linking building and two new outbuildings, and extensive site landscaping.



**No detail, inside nor out, escaped Pat’s loving attention.** Architect John Milner explains, “Pat was instrumental in the interior design, including salvaging and acquiring antique architectural materials, furnishings, fabrics, and decorative arts. A true labor of love, Pat’s fine interior decoration complements the period architecture and stays true to its Brandywine roots.”

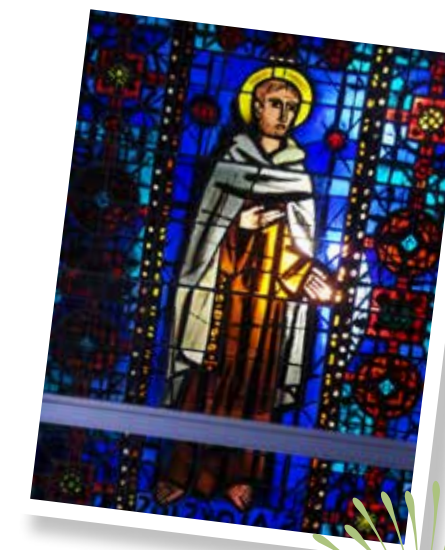
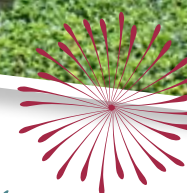
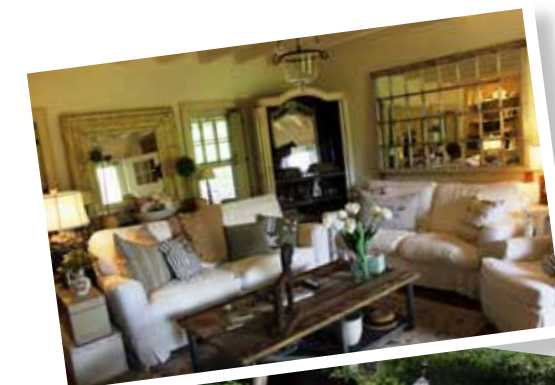
Knowing that a project is only as good as its general contractor, the Celii’s give exceptionally high marks to Spencer Abbott Builders. John notes proudly, **“They did a superb job**, exercising great skill in managing the construction process and all aspects of the execution.” Collaboration out-of-doors was also critical to the home’s picture-perfect presentation. Jonathan Alderson Landscape Architects reconfigured and redesigned the entire site to make the three separate parcels of house work together, with terraces off all the main rooms, new gardens, screening from the road, and a realigned driveway. Every tree, every shrub, every flower, every pathway, every statue was lovingly and carefully selected by Pat.

As their home was being restored, **John shared his extensive knowledge** and expertise by serving on several high-tech companies’ Boards. And John remembered where he came from, first serving on Bishop Shanahan High School’s Advisory Board, and later joining the Chester County Community Foundation Board of Directors.

While serving on Bishop Shanahan’s Advisory Board, John and Pat began to realize that **the Celii family could use their hard-earned wealth to strategically help others.** The Celii family created a scholarship fund to benefit Shanahan students. Also, they became leadership donors to Bishop Shanahan’s capital campaign, with a special gift to build and decorate the Celii Chapel. “We needed to honor my mother and Reverend Kehoe,” explains John, “because our lives would have taken far worse turns if they hadn’t pushed me.”

Given some time to ponder what to accomplish next, John and Pat once again realized the import of Shanahan’s motto to **“seek the things that are found above.”** For years, those near and dear to them had fought battles to cure chronic illnesses. While some won, others lost. The Celii family decided to focus their abundant talents, energy and resources to help others who face health issues.

**They thought about starting their own family foundation.** However after discussing ideas with their CPA and trust attorney, they found an easier method to achieve their philanthropic goals. John explains, “We decided to join an existing organization that was already up and running, and that had expertise in grant making activities. We reviewed what the Community Foundation was trying to accomplish, and we readily concluded that it could facilitate our philanthropic objectives.”



“Seek the things that are found above.”

– Colossians





**“We have maintained a very good relationship with the Community Foundation** since we created our donor advised fund in 1999,” John says. “They have made many good suggestions relative to where we could make a difference in the community. They have allowed us truly to be ‘donor advisors’ and make our own decisions regarding grant making. Once we make a decision, we inform the Foundation staff, and they make it happen! Pat and I are very happy that we decided to join forces with the Community Foundation to achieve our gifting strategies.”

**The Celii family makes grant decisions based on logical analysis combined with heartfelt passion.** One of their first major health grants focused on **thyroid cancer research**. All too familiar with thyroid issues, the Celii family knew that 12 million Americans have thyroid nodules that require medical evaluation; that 33,000 Americans are annually diagnosed with thyroid cancer, which afflicts women three times more than men; and that SE PA and New Jersey have among the highest rates for thyroid cancer in the U.S. The CCCF Celii Medical Research Fund provided critical funding for the Penn Thyroid Center, which in conjunction with Abramson Cancer Center of the University of Pennsylvania provides a full range of diagnostic and treatment options for thyroid cancer, including surgery and external beam radiation, and long-term follow-up. Integrated with Penn’s world-class Division of Endocrinology, Diabetes, and Metabolism, and the Abramson Cancer Center, the Penn Thyroid Center coordinates translational and patient-oriented research, providing innovative partnership with basic science discovery.

**The Women’s Specialty Care Center at Chester County Hospital** is another shining example of the type of philanthropic projects that the Celii family finds rewarding. After touring and learning about the hospital’s many worthy projects, the family realized how much women’s health resonated with each of them, in a big way. They decided to make a six-figure challenge gift to incentivize other leadership donors.

In 2009, the Specialty Care Center opened its doors to women. Pat quietly explains, “The Center is especially designed to create a calm, coordinated, patient-centered environment. **In too many places, women are left in the dark about the details of their health care**, and the system is fractured and communicates poorly. So much needless running around and worry, at a time when a woman needs to focus her energies.” The innovative, state of the art Center expertly addresses women’s needs related to breast care, gynecologic/ oncology, urogynecology and genetics counseling.



Additionally, The Celii family has funded Chester County Hospital’s **DaVinci Robotic Surgery technology**, and the hospital’s **Emergency Room** renovations. We’ve been in E.R.s far too often,” Pat explains.

As John and Pat look to the future, they are clear that **family philanthropy is a cornerstone**. “We remember when we didn’t have two nickels to rub together,” says John ruefully, “and we know what it’s like to feel helpless even when you have love and resources around you.”

**“Our daughters and our granddaughter have started to pave their own way in the charitable world, and we are proud of them.”** Pat explains, “They care about different things than we do, and that’s O.K. Actually, it’s great. They are their own women, and they are generous, caring, daring and strong. We look forward to the journey as they become even more involved with the needs and aspirations of the world.”

John and Pat Celii’s life journey is something of a **“rags to riches story.”** The Celii family has many options regarding what to achieve with their wealth, and how to execute their objectives. As they continue to **“seek the things that are found above,”** the Celii family continues to make a positive impact in their community, generously giving their hard earned wealth through strategic, impassioned grantmaking; and volunteering their time to make the world better.



**“We want to give to those who are medically and economically challenged. We each can make a positive community impact by giving and volunteering. Do both!”**





# LEGACY FUNDS:

## What Legacy Will You Leave?

Legacy philanthropy is much more than sending a check. It ensures your continuing support for causes you care about, in perpetuity. It gives you the opportunity to carry on a family giving legacy. Combined with careful estate planning, it ensures that your personal resources are used to accomplish your financial and charitable goals.

Gifts to the Community Foundation can be made at any time to provide grants for current community needs and for perpetuity. By establishing a fund with the Community Foundation, you receive:

- **Permanence:** The Community Foundation's trusteeship ensures that your contribution will continually meet needs relevant to your interests.
- **Commemoration:** Your name or the name of a loved one can live on through your fund. If you prefer, you may choose a name that reflects your fund's charitable purpose.
- **Stewardship:** The Foundation's Board of Directors, with guidance from its Investment Committee, staff, and outside investment counsel, closely monitors the performance of professional investment managers. The Foundation makes a full accounting to the community through its annual report, audit, and IRS Form 990.
- **Grantmaking Expertise:** The Community Foundation expertly assists in identifying charitable organizations and programs that address your particular interests and core values.

**The Community Foundation primarily holds endowed funds in trust. We also manage some provisional funds.**

- **Endowed Funds** are allowed up to a 5% grant payout for perpetuity, to assure that grant funds are always available to help nonprofits.
- **Quasi-Endowed Funds** are allowed up to a 20% grant payout, which means the principal will be diminished over time.
- **Provisional Funds** can be paid out in full at any time.

**Grants awards are made to bona fide nonprofit causes throughout the United States.**

### TYPES OF FUNDS

#### CCCCF Funds

- **Fund for Chester County** gifts enable the Grants Committee to award strategic grants to Chester County nonprofits.
- **Lincoln Building Fund** gifts support the renovation and repair of the Foundation's historic 1833 headquarters.
- **Operating Endowment** gifts allow the Foundation to focus on its core mission, growing legacy philanthropy throughout the region.

#### Field of Interest Funds

Donors who seek to impact a targeted issue area (arts, education, environment, health, human service, religion) or specific geographic region establish Field of Interest Funds. By naming an interest area rather than a specific organization, flexibility exists to meet ever-evolving community needs.

#### Donor Advised Funds

An alternative to a private foundation, Donor Advised Funds are popular with donors who wish to establish a Foundation without incurring administrative operating and compliance filing burdens, while capitalizing on the Community Foundation's philanthropy expertise and nonprofit field research. Donor Advised Funds enable individuals, families, community groups, and businesses to focus their philanthropy and make grants that impact the causes they care about most.

#### Organizational Endowment and Nonprofit-Designated Funds

Designated Funds are created by nonprofit organizations and individual donors who care about the long-term success of particular nonprofit charities. This lets donors support specific charitable organizations for perpetuity, while the Community Foundation manages investments professionally and monitors for accountability.



### Scholarship Funds

Establishing a Scholarship Fund allows the donor to support students pursuing education beyond high school. A donor may name the scholarship's selection committee and the guidelines for candidate selection. Most scholarships at the Community Foundation benefit disadvantaged, promising students from a particular high school, or those who pursue a particular field of study.

### Memorial Funds

Donors can quickly and cost-effectively create commemorative funds honoring people they hold dear.

### LIFETIME GIFTS

Your charitable interests can be supported during your lifetime—and in perpetuity—through your gift. You will have the satisfaction of seeing the impact of your generosity as you carry out your charitable objectives.

### FUTURE GIFTS

The Community Foundation can help you articulate your wishes for a gift commencing after your lifetime. The Community Foundation accepts most planned giving vehicles, including charitable gift annuities, bequests, retirement fund assets and life insurance. If you decide to leave a planned gift to the Community Foundation, or to a fund at the Community Foundation, please let us know so that we can properly carry out your wishes.

### WAYS TO GIVE

There are many ways to become part of the Community Foundation and make a lasting contribution to our community:

- Establish and name **your own fund**, a family fund, a scholarship fund, or a memorial fund, with a gift of \$25,000 or more
- Establish a fund to benefit **a specific nonprofit charity (or charities)**, with a gift of \$25,000 or more
- Support Chester County's greatest needs and opportunities by contributing any amount to our **Fund for Chester County**
- Enable the Community Foundation to reach out and recruit new legacy philanthropists by contributing any amount to our **Campaign for Independence Operating Endowment**, annual **Friends** campaign, or **Imprints** Initiative
- Maintain and restore the Foundation's historic headquarters with a contribution to the **Lincoln Building Fund**
- Focus your gift with a contribution to a **Field of Interest Fund** (arts/culture, health, human services, religion, education, environment)
- Give **anonymously**
- Create a **testamentary** fund: open it now, fund it later
- Make a **planned gift** – through your Will, a charitable trust, or a charitable gift annuity – to support a thriving, healthy Chester County community for years to come.



The Community Foundation accepts a wide variety of gifts including:

- Cash
- Publicly traded securities
- Closely-held and pre-IPO stock
- IRAs
- Life insurance with the Community Foundation as owner and/or beneficiary
- Remainder of a Charitable Remainder Trust
- Remainder of a Pooled Income Fund
- Lead gift of a Charitable Lead Trust
- Real estate

*To create your legacy fund, contact Karen Simmons, President/CEO (610) 696-8845*

*Beth Harper Briglia, Vice President (610) 696-8045  
Meetings are confidential.*

*\$25,000 = minimum to create endowed fund*

*\$125,000 = average fund size*

*Any gift amount can be added to existing funds.*



# BEN FRANKLIN LEGACY SOCIETY

If you have named the Chester County Community Foundation or any of our funds as a beneficiary in your Will, charitable gift annuity, charitable remainder trust, life insurance, or retirement plan, you are eligible for membership in our Ben Franklin Legacy Society.

By joining our Ben Franklin Legacy Society, you make your intentions public and help inspire others. This helps to build a strong, vibrant philanthropic community. To join the Society, simply advise the Foundation of your intent. You can give to any existing fund, or create one of your own.



## LEGACY SOCIETY MEMBERS

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Robert & Lucille Bugel  
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### DESSERTS

**Most Creative:** General Warren Inne - Deconstructed  
Carrot Cake  
**Best Dessert - Popular Vote:** New Street Catering -  
Brownie Cookie Dough Mocha Cheesecake Bar  
**Best Dessert - Professional Judges:** Carlino's - Lemon  
Blueberry Coconut Tiny Pie

Brandywine Prime - Black Garlic  
"Tootsie Rolls" with Dried Apricot  
Cakes and Candies by Maryellen -  
Maple Bacon Bread Pudding  
Cupcakes Gourmet - Mini Cupcakes:  
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Mile High Steak & Seafood - Very Berry Trifle  
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Albert Lauber, Swiss Chocolatier, Neuchatel Chocolates  
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## GUEST SWEET PARTING GIFTS

Courtesy of Albert Lauber, Swiss Chocolatier,  
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*+ all our former Community Foundation interns who return  
to lend a hand*



# Donors



The Community Foundation gratefully recognizes our donors who create and contribute to the Community Foundation's family of funds. Special thanks to those who so generously contribute to the Foundation's own core operating annual, capital, grantmaking and endowment funds.

**Contributions totaled \$4,463,788 from 2,575 donors.**

## DONORS 7/1 TO 6/30

*Due to space limitations, donations over \$250 are included in this listing. All donations are vital to us.*

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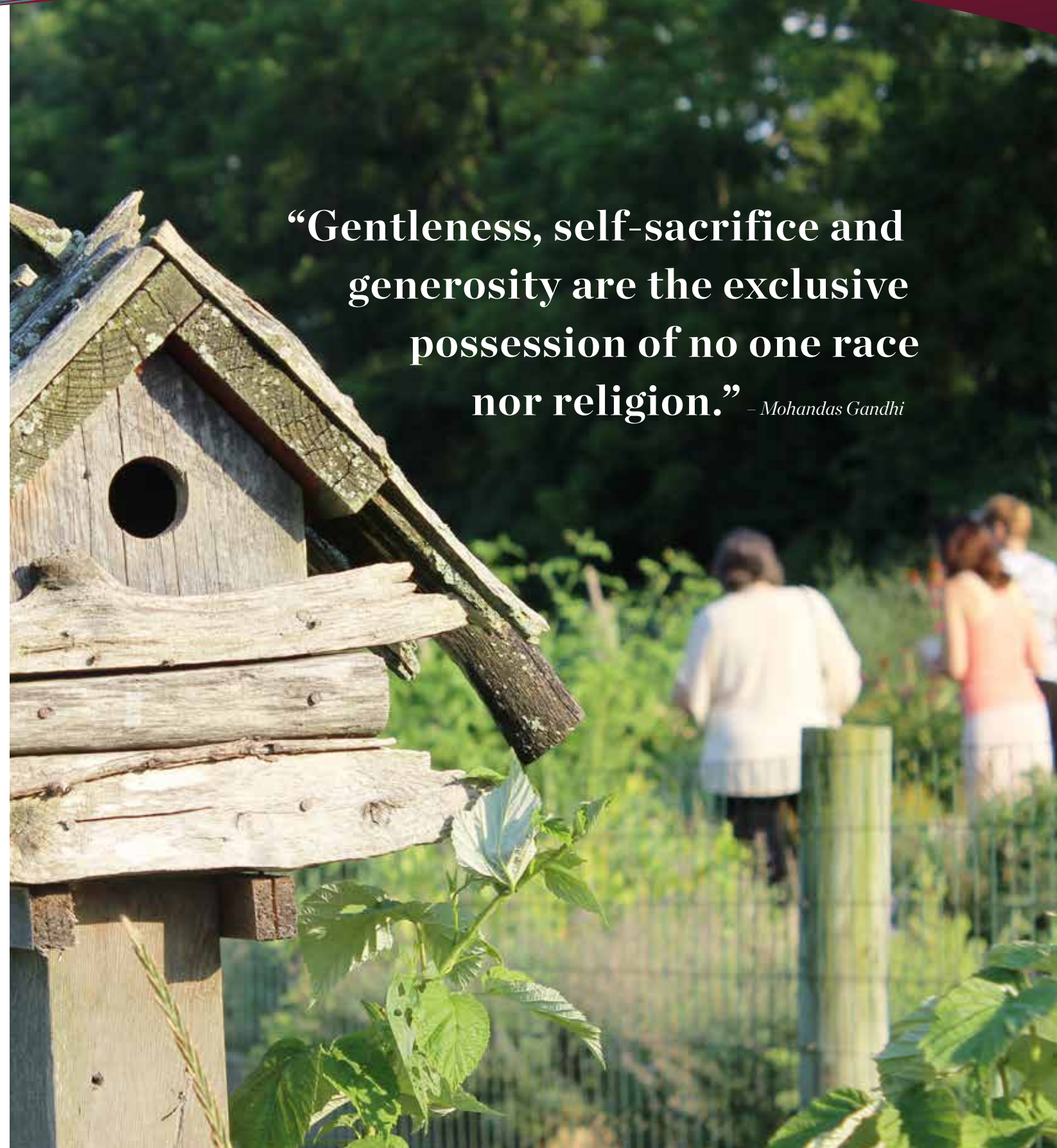
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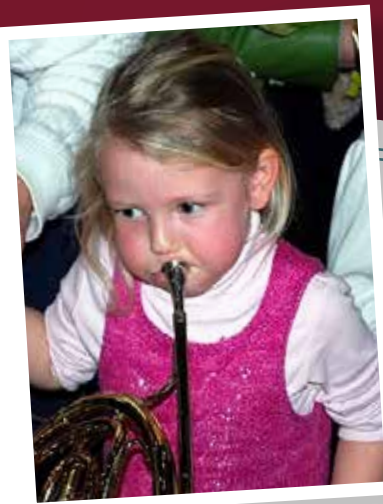
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Mrs. Loretta L. Simon  
Mr. & Mrs. Langhorne B. Smith  
Mr. & Mrs. Derek Stedman

*Please note: Please help us correct errors or omissions. Contact the Foundation at (610) 696-8211 or info@chescocf.org. Thank you for your understanding and assistance.*



**Note: This especially hardy tomato plant grows from the Belgian block concrete parking lot of the Lincoln Building, with no visible soil, water, nor care. It inspires us to grow philanthropy everywhere it might take root, even in the most unusual, surprising places and conditions.**



# INVESTMENT MANAGEMENT

## Portfolio Objectives

The Foundation is committed to prudent investment management strategies and fiscal policies that it believes will lead to the long-term growth of endowment fund principal and meet the Foundation’s distribution policy objectives. The Foundation seeks to preserve and enhance the value of the portfolio’s assets by providing long-term growth greater than the rate of inflation and fee costs, while recognizing that prudent risks must be taken.

The Foundation’s investment goals are:

1. to achieve a return in excess of the target return
2. to minimize portfolio drawdown risk, to the extent possible, in seeking to achieve the Foundation’s long-term growth objectives.

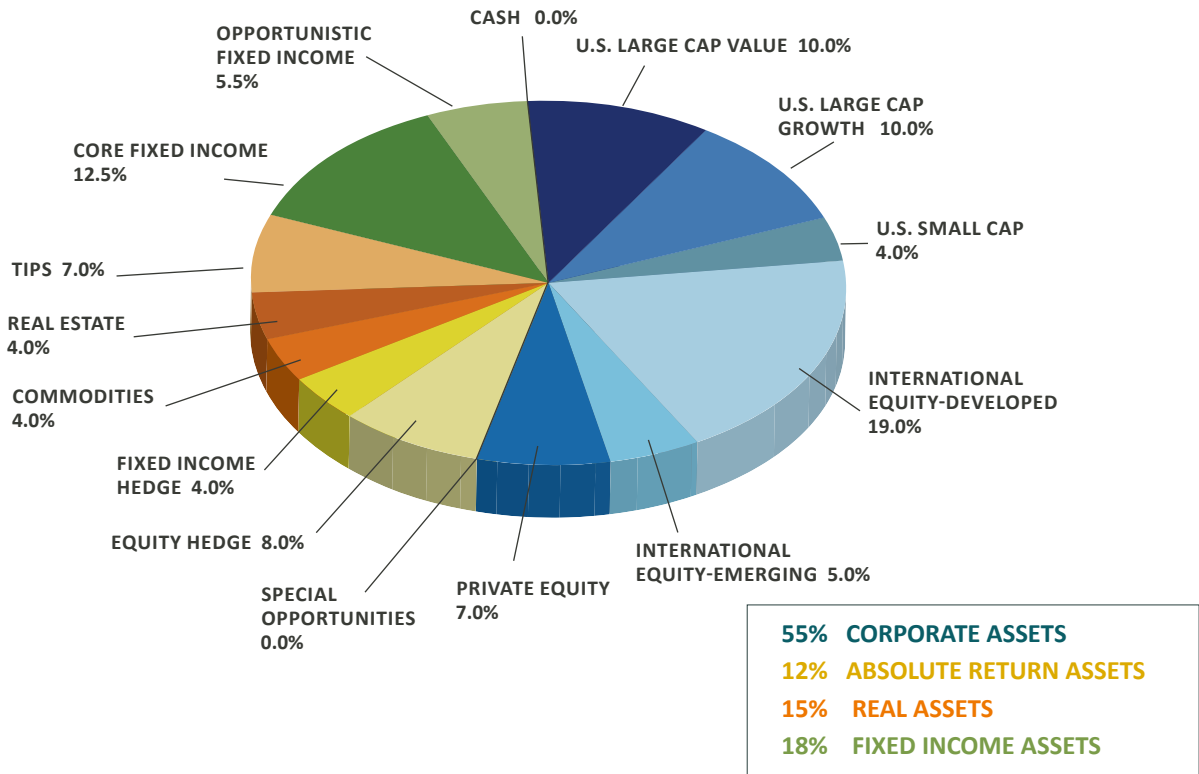
**Endowed Funds Long Term Target Return:** The Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation’s administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year end balance). Based on the fluctuating actual spend, the minimum required long term target return will be defined as the trailing 5 year actual spend rate + Current CPI + administration fees.

**Quasi-Endowed Funds Long Term Target Return:** The Foundation desires a long term target return that provides portfolio growth, covers investment fee expenses, covers the Foundation’s administrative fee, and covers the liquidity necessary for a potential annual grant payout (of up to 20% of the previous fiscal year end balance).

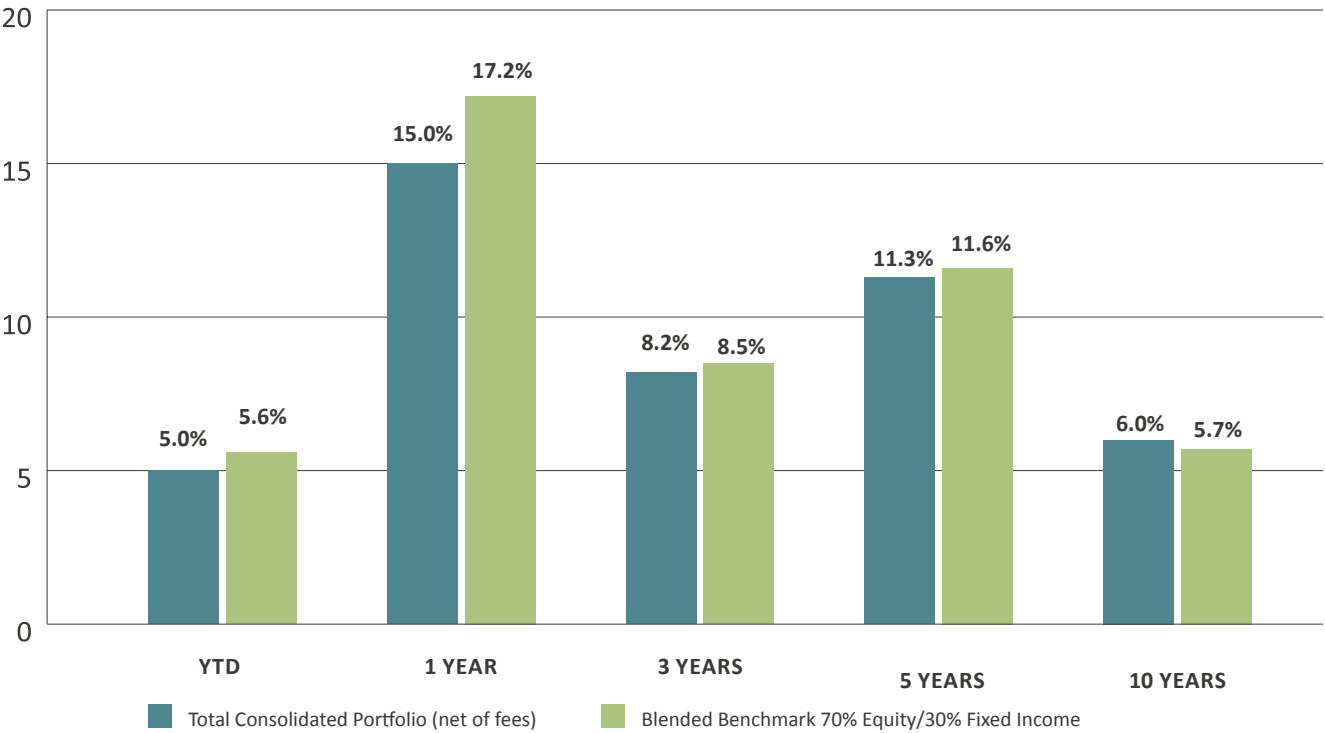
## Policy Portfolio Structure and Ranges

ASSET CLASS	BENCHMARK	ENDOWED RANGE	QUASI RANGE
Corporate Assets	ACWI ETF	35% - 70%	30% - 65%
Absolute Return Assets	Cash + 5%	10% - 25%	10% - 20%
Real Assets	HC Commodities Index/TIPS ETF/REIT ETF	10% - 25%	10% - 20%
Fixed Income Assets	BarCap Agg ETF	10% - 40%	10% - 55%

## Asset Allocation Strategy Targets CCCF Aggregated Endowed Funds



## Total Consolidated Annualized Returns for the Endowed Portfolio as of 6/30/2014



For a copy of the Foundation’s Investment Policies, contact Business Affairs (610) 696-8211 [info@chescof.org](mailto:info@chescof.org)





## Chief Investment Officer Firm – Aggregate Invested Assets



**HIRTLE, CALLAGHAN & CO. serves as the Community Foundation’s Chief Investment Officer (CIO).** Hirtle Callaghan works with the Community Foundation to develop a formal Investment Policy designed to best meet the Community Foundation’s long-term objectives. The Investment Policy is formulated on a long-term, broadly diversified strategic asset allocation plan with asset class targets and operating ranges.

As the Foundation’s CIO, Hirtle Callaghan’s full time focus is to deliver strategic and proactive asset class guidance and total investment program implementation of the portfolio’s assets including the identification, selection, and termination of investment managers. Hirtle Callaghan is also responsible for retaining and directing the activities of the independent custodian, and all other vendors involved in providing data, analysis and other services used to manage the portfolio. Hirtle Callaghan provides quarterly statements and performance reports, net of all fees, with comparisons to relevant benchmarks.

## Medallion Investment Partners – Separately Managed Invested Assets

The Community Foundation’s Medallion Investment program gives you the opportunity to establish a donor advised fund at the Community Foundation, while having a qualified advisor you choose continue to manage the asset and receive investment management fees. It all adds up to a winning formula:

- donors supply the charitable passion
- wealth managers and investment advisors supply the investment expertise
- the Community Foundation supplies the charitable legacy vehicle

### All get credit for the perfect charitable solution.

- Medallion status is awarded to investment advisors/firms which pass an annual due diligence review undertaken by the Community Foundation’s Investment Committee. Medallion funds are separately managed, non-aggregated funds, which receive their own investment return. The Community Foundation may charge a modest additional annual fee to the charitable fund for this service.
- The minimum amount to start a donor advised fund in the Medallion program is \$250,000 with the intent to grow to at least \$1 million. The minimum for non-medallion investment partner program funds is \$25,000.

There are three Levels of Medallion Investment Partners for Separately Managed Accounts:



**GOLD**  
Foundation Funds Invested



**SILVER**  
Planned Gift Pledge  
Investment Partner



**BRONZE**  
Pre-approved as medallion  
partner, no funds yet

 <b>Gold Foundation Funds Invested</b>	   
 <b>Silver Planned Gift Pledge Investment Partner</b>	 
 <b>Bronze Pre-approved as medallion partner, no funds yet</b>	  



**SUSQUEHANNA WEALTH MANAGEMENT** provides a comprehensive suite of wealth management services to individual and institutional clients delivered through regional offices throughout Susquehanna Wealth Management’s footprint. Susquehanna Wealth Management (SWM) is a registered service mark under which all of the Susquehanna Bancshares, Inc. wealth management affiliates operate. SWM is a full-service wealth management practice with \$8 billion in assets under management and administration\* with offerings that include expertise in the areas of asset management services, retirement plan services, fiduciary services, brokerage and insurance solutions and comprehensive financial planning.

\*As of 6/30/14 Susquehanna Wealth Management is a registered service mark of Susquehanna Bancshares Inc (SBI). Retirement Plan Services are offered through Valley Forge Asset Management, LLC (VFAM). Securities, insurance products, and investment advisory services are offered through VFAM, a SEC registered investment advisor, a registered broker-dealer (Member FINRA/SIPC), and a licensed insurance agency. VFAM is a wholly owned subsidiary & non-bank affiliate of SBI. Securities and insurance products are: Not FDIC insured • May lose value • Not bank guaranteed • Not a deposit • Not insured by any federal government entity.



Jack Karakelian, CFP®, CFM and Peter Snelling, CIMA®, CPWA® of the **SNELLING GROUP AT MERRILL LYNCH IN EXTON** help successful executives, entrepreneurs and families navigate the financial challenges and ultimately the transitions of their careers and lives. Their planning-based practice provides a comprehensive and personalized approach to their financial and investment concerns. They combine knowledge, experience and acumen with a deep understanding and appreciation of not just their client’s goals, risk preferences, and objectives but of their family, interests and passions. They embody Charles Merrill’s motto, **“The interests of our customers must come first”** in a process that works closely with clients to help them live the lives they want.



**DOMINI SOCIAL INVESTMENTS** meet baseline standards of corporate citizenship that are both good for society and good for the bottom line. Domini believes companies with fewer environmental liabilities, more diverse boards and workforces, generous employee benefits, and authentic commitments to their communities are better positioned to succeed and prosper.



Since its 1975 founding in Malvern, **VANGUARD** has become the world’s largest pure no-load mutual fund company, managing @\$2 trillion in assets. Founder John C. Bogel is credited with creating the first index fund available to individual investors, the popularization of index funds, and driving costs down across the mutual fund industry. CCCF Endowed Funds are invested in the **Life Strategy Growth Fund**, an 80/20 asset allocation. CCCF Quasi-endowed funds are invested in the **Conservative Growth Fund**, a 40/60 allocation.



We help you find the best charitable solutions...  
Individuals increasingly expect their professional advisors to assist them with strategic philanthropy as part of overall planning.

The Community Foundation is a philanthropy resource for estate planning attorneys, wealth managers, financial planners, and CPAs:

- the client understands their own needs and desires
- the advisor understands their client’s financial and estate circumstances; and
- the Community Foundation understands legacy philanthropy.

**It’s a winning partnership.** The Community Foundation helps advisors and their clients customize philanthropy solutions for their specific situations. Whether it is through a gift of appreciated securities or real estate, a non-cash asset, a life insurance policy, or bequest, there are many ways the Community Foundation helps professional advisors find solutions, to help fulfill dreams of giving to the community.



“We all live with the objective of being happy; our lives are all different and yet the same.” - Anne Frank

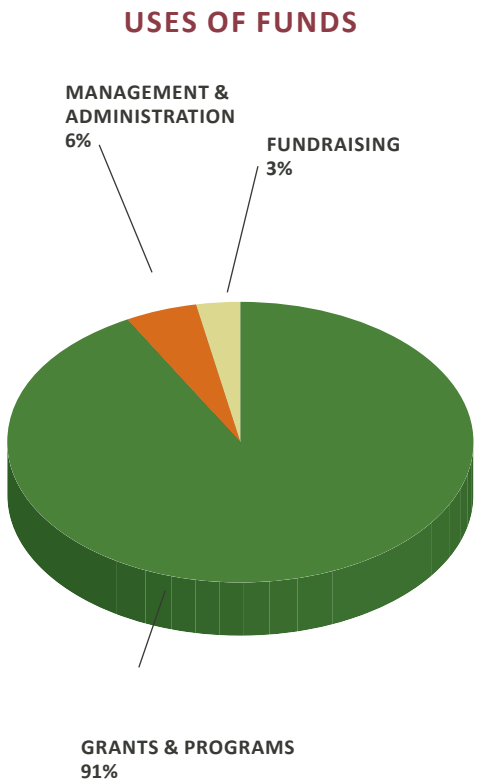


# FINANCES

CHESTER COUNTY COMMUNITY FOUNDATION  
STATEMENT OF FINANCIAL POSITION as of June 30  
*Audited by Umbreit Korengel & Associates*

	AUDITED 2014	AUDITED 2013
<b>ASSETS</b>		
Cash & cash equivalents	\$4,089,990	\$4,101,960
Unconditional promises to give, net	112,498	228,360
Prepaid expenses	11,625	12,626
Loan receivable	250,000	0
Certificates of deposit	967,209	1,544,624
Marketable securities	41,632,021	33,136,862
Property & equipment, net	489,480	505,963
<b>TOTAL ASSETS</b>	<b>\$47,552,823</b>	<b>\$39,530,395</b>
<b>LIABILITIES</b>		
Accounts payable & accrued expenses	\$102,663	\$36,408
Annuities payable	276,305	285,000
Not-for-profit endowments	3,900,718	3,106,296
<b>TOTAL LIABILITIES</b>	<b>\$4,279,686</b>	<b>\$3,427,704</b>
<b>NET ASSETS</b>		
Unrestricted-board designated	\$43,160,639	\$35,874,331
Temporarily restricted	112,498	228,360
<b>TOTAL NET ASSETS</b>	<b>\$43,273,137</b>	<b>\$36,102,691</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$47,552,823</b>	<b>\$39,530,395</b>

To obtain a copy of the audit or IRS 990, contact the Foundation.  
(610) 696-8211 or [info@chescofcf.org](mailto:info@chescofcf.org)







# BOARD OF DIRECTORS

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Partner, Lamb McErlane  
Vice Chair

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Partner, Buckley, Brion, McGuire & Morris  
Vice Chair

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Community Volunteer  
Corporate Secretary/Treasurer

L. Peter Temple, Esq.  
Partner, Larmore Scarlett  
Immediate Past Chair
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Shareholder, Rainer & Co

John Diederich, CFA  
Director of Investment Strategy  
Dock Street Capital

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Community Volunteer

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CEO, Envisian

Kevin Holleran, Esq.  
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Community Volunteer

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Principal, Capacity for Change
- Robert E. Rigg, CIC, CPCU, CLU  
CEO, Rigg Darlington Group
- Karen A. Simmons, ex officio  
President/CEO, Chester County  
Community Foundation
- EMERITII**
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Louis J. Beccaria, Ph.D.  
John A. Featherman, III, Esq.  
Wiggie Featherman  
Carol Ware, Ph.D.  
Charles Lukens Huston III  
Elizabeth Ranney Moran  
Eva L. Verplanck, Ph.D.
- Dr. Henry A. Jordan  
*cum stellarum*  
Founding Chair, 1994-2000

# COMMITTEES

The Community Foundation thrives due to the work of its committees, composed of Board members and community volunteers. These individuals dedicate countless volunteer hours to increase philanthropy throughout Chester County.

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Kathy Dean-Bradley, CPA  
David Glarner  
Debra Horak  
Douglas Pacitti, CPA  
Cynthia Sineath Ray, CPA  
Robert E. Rigg, CIC, CPCU, CLU  
Louise Smith, CPA

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NOMINATING COMMITTEE**  
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Kevin Holleran, Esq.  
Stacey Willits McConnell, Esq.  
Meghan A. McVety, MPA  
Anthony Morris, Esq.  
Eva L. Verplanck, Ph.D.

**GRANTS COMMITTEE**  
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Carol A. Clark  
Louis J. Beccaria, Ph.D.  
Meg Habenicht  
Pamela Leland, Ph.D.  
Michael Louis, Esq.  
Gerardina Martin  
Moirra Mumma  
Joanne Peskoff, Esq.  
Eva L. Verplanck, Ph.D.
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Jennifer L. Byrne, CFA  
Richard C. Clark, CFP®, ChFC®  
Michael R. Horak, CFA  
L. Stockton Illoway, CLU,  
ChFC, MSFS  
Francis Brinton Jacobs, II  
Michael B. Karwic, CFP, CRPC  
Matthew D. Kelly  
Tracy Musser  
Patrick South, CFA  
Louis N. Teti, Esq.  
Philip C. Wagner, CFA

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Co-Chair  
Stephen Olsen, Esq.,  
Co-Chair  
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Richard Clark, CFP®, ChFC®  
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Meredith Huffman  
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Jonathan Long  
Terry Manning  
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Patrick South, CFA  
Charles Streitweiser  
Janet Zeis
- C4 CHESTER COUNTY  
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Constance Carter, CFRE  
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Donna H. Melton  
Kristine Parkes, MA, CFRE  
William D. Pugh, CFRE  
Carol Dickol Revak, CFRE  
Louise Schorn Smith,  
CPA, CMA  
Sonia Stamm  
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J. Stoddard Hayes, Esq.  
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- Nancy Pine, Esq., AEP®  
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L. Peter Temple, Esq.  
Louis N. Teti, Esq.  
Nikolaos I. Tsouros, Esq.

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Patrick South, CFA  
Harry R. Tyler, CFP, CAP  
Philip C. Wagner, CFA  
Chris Valerio, CFA

## Special Thanks

The Community Foundation Board acknowledges the dedicated service of these Board members whose terms expired June 30, 2014:

- **Sara D. Harris, CPA**, Finance & Audit Committees
- **J. Stoddard Hayes, Esq.**, Nominating/Governance Committee, Strategic Planning Task Force
- **Cindy Sineath Ray, CPA**, Treasurer of the Board, Finance Committee Chair, Audit Committee, Fund Policies Task Force







## STAFF

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Beth Harper Briglia, CAPR  
**Vice President, Donor Services & Grantmaking**

Carla Moore  
**Controller**

Stephenie Stevens  
**Advancement Manager**

Lisa M. Slawinski  
**Communications Manager**

Brittany Deeney, Advancement  
Alyssa Dougherty, Advancement  
Dylan Marberger, Business Affairs  
Janine Linahan, Business Affairs  
**WCU Student Interns**



Connecting people who care with causes that  
matter, so their philanthropy makes a difference  
**NOW AND FOREVER.**

