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 principal 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.

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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

NATIONAL STANDARDS

growing philanthropy
for good. forever

Thank you all for celebrating Norm’s 90th by supporting his Believe, Play, and Have Fun Foundation.

The Children’s Home of Philadelphia

The Chester County Community Foundation
INSPIRE LEGACY PHILANTHROPY

In Chester County, life is good.

Chester County is consistently in the limelight, regularly winning kudos in lists of the Best Places to Live. We enjoy attractive parks and open spaces, top schools, accessible health care, affordable property taxes, and plenty of community events. It’s an easy drive to Philadelphia and Wilmington, a convenient train ride to anywhere on the East Coast, and an international airport with connections to the world at our fingertips. Plus strong economic growth: construction of roads, homes and businesses, with lots of shopping, restaurants, and plenty of jobs. An abundance of prosperity.

Life is good at the Community Foundation, as well. During the past year,

• we proudly awarded $2 million in grants and scholarships to the community;
• 24 new funds were created, bringing the total number of funds to 350; and
• contributions totaled $3,665,185 from 2,553 donors.

Since our 1994 founding, $31 million has been awarded via 7,154 grants and scholarships.

At the Community Foundation, we are poised for stronger, deeper impact and longer term growth.

• Our operating revenues have become much more diversified and sustainable.
• Our endowed charitable asset growth is steady and sure. Every other week, someone creates a new endowed legacy fund. And every day, people contribute to existing funds to consistently grow legacy philanthropy.
• Our Board and staff are focused, energetic, and bursting with passion for the power of philanthropy to change lives for the better
• Our beloved historic Lincoln Building is bustling with activity. Fund advisors, donors, professional advisors, nonprofit staff and board members, and public officials frequent the offices for meetings, trainings and tours.

Much of our strength comes from the partners we rely upon:
• Professional advisors, especially estate planning attorneys, CPAs, and wealth managers, who speak earnestly with their clients about legacy philanthropy and bring forth the Community Foundation as an option for consideration when appropriate
• Our current fund advisors, who spread the word to their family, friends and colleagues about the joy of giving and community involvement
• Nonprofit Board and staff members, who seek grants for current needs, while at the same time seek the Foundation’s assistance to grow their endowment funds via deferred, planned gifts.

The Community Foundation has deepened programs and services to our key constituents, focusing on long-term growth. We have refined our:
• Family & Individual Philanthropy Suite of Services, including a Philanthropy Learning-Action-Network to engage a diverse array of emerging philanthropists
• Nonprofit Endowment Suite of Services, to enhance our reach to nonprofit staff and Board members
• Professional Legacy Advisor Network programs, with information and tools to better serve client philanthropic interests.

We look forward to seeing you at our legacy philanthropy programs throughout the year. Thanks for all you do to intentionally and thoughtfully create caring, generous communities...so that Chester County continues to get even better, for now and FOREVER.

Karen A. Simmons
President/CEO

William Gallagher, Esq.
Chair of the Board, 2014-2016
Due to space limitations, grants over $350 are listed:
Act in Faith of Greater West Chester
Aidan’s Heart Foundation
ALS Association
Alzheimer’s Foundation of America
American Cancer Society - East Central Division
American Diabetes Association
American Foundation for Suicide Prevention, NY
American Heart Association
ARCH of Chester County
Archmere Academy
Art Partners Studio
Association for the Colonial Theatre
Atlantic Salmon Federation
Atoneum Lutheran Church
Austerlitz Historical Society
Balanced Innovative Teaching Strategies
Barn at Spring Brook Farm
Big Brothers/Big Sisters SE PA
Bilingual Education for Central America BECA
Bishop Shanahan High School
Boy Scouts of America, Chester County Council
Boys Latin of Philadelphia Charter School
Brandywine Baptist Church
Brandywine Health Foundation
Brandywine Valley Association
Breastcancer.org
Bridge Academy and Community Center
Bridge of Hope of Lancaster & Chester Counties
Bramham and Women’s Hospital
Bringing Hope Home
Bryn Mawr Presbyterian Church
Calistoga Boys & Girls Club
Calvary Lutheran Church
Camp Dreamcatcher
Camp Hill Special School
Canaan Congregational Church
Canaan Protective Fire Company
Canine Partners for Life
Catawba College
Centennial Lutheran Church
Center for Italian Modern Art
Chadds Ford Historical Society
Chemical Heritage Foundation
ChesPenn Health Services
Chester County 2020
Chester County Arts Association
Chester County Community Dental Center
Chester County Department of Community Development
Chester County Extension
Chester County Food Bank
Chester County Fund for Women and Girls
Chester County Futures
Chester County Historical Society
Chester County Hospital
Chester County Hospital Foundation
Chester County Opportunities
Industrialization Center
Chester County Public Safety Training Foundation
Chester County SPCA
Chester County Suicide Prevention Task Force
Chester County Suicide Prevention Task Force
Children’s Hospital of Philadelphia
Christ Community Church
Citizens Advocacy of Chester County
City Gate
The Clinic
Coaches vs Cancer
Coatesville Center for Community Health
Coatesville Youth Initiative
Colonial Theater

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 is $3,000.

During FY2015, $2,000,097 in grants and scholarships was awarded to address needs in our community.

530 grants totaling $1,626,344 and 171 scholarships totaling $373,753.
Community Coalition  
Community Volunteers in Medicine  
Concordville Fire & Protective Association  
Council on Foundations  
County Corrections Gospel Mission  
Crime Victims Center of Chester County  
Cru  
Daemion Counseling Center  
Dana Farber Cancer Institute  
Daylesford Abbey  
Decade to Doorways  
Delaware County Community College  
Delaware River Keeper  
Dempsey Center  
Devon Preparatory School  
Doctors Without Borders USA  
Domestic Violence Center of Chester County  
Downingtown Area Senior Center  
Downingtown Library  
Downingtown West High School  
Drexel University  
Elizabethtown College  
Episcopal Diocese of Pennsylvania  
Evergreen State College  
Family Coalition of Delaware County  
Fame Fire Company  
Family Lives On  
Family Promise of Southern Chester County  
Family Service of Chester County  
Family Stations Radio  
First Presbyterian Church  
First West Chester Fire Company  
Folds of Honor  
Foundation at Great Valley  
Free Public Library of Philadelphia  
French & Pickering Creeks Conservation Trust  
Friends Association for Care & Protection of Children  
Friends Home in Kennett Square  
Friends of Chatham Public Library  
Friendship Ministries Foundation  
Garage Community & Youth Center of Kennett Square  
Garage Community & Youth Center West Grove  
George School  
Girls Golf Revolution  
Glaucous Initiative Foundation  
Global Aid Network  
Good Fellowship Ambulance  
Good Samaritan Shelter  
Good Will Fire Company  
Good Works  
Great Valley After-Prom Party  
Great Valley Nature Center  
Greater Philadelphia Fellowship of Christian Athletes  
Greener Partners  
Gridiron Greats Assistance Fund  
Grimes A.M.E. Church  
Habitat for Humanity of Chester County  
Haiti Partners  
Hamilton College  
Handi-Vangelism Ministries International  
Handi-Crafters  
Harbor School  
Harvey Kaufman Memorial Scholarship Fund  
Haverford College  
Healthcare Access Foundation  
Heifer International  
Heroes Among Us - Police Survivor’s Fund  
The Hickman  
Hill School  
Historic Kennett Square  
Hope for Kids  
Hope Springs Equestrian Therapy  
Housing Partnership of Chester County  
Huntington Theatre Company  
IHS Global  
Inspira Health Network  
Interfaith Housing Assistance Corporation of Chester County  
International Rescue Committee  
Jenner’s Pond  
Jesuit Center at Wernersville  
Jewelers for Children  
Joseph & Sarah Carter Community Development Corporation  
Kennett Area Community Services  
Kennett Fire Company #1  
Kennett Flash  
Kennett Food Cupboard  
Kennett Middle School  
Kennett Public Library  
Kennett Run Charities  
Kennett Symphony of Chester County  
Kennett Underground Railroad Center  
Kids Smile  
Kimberton Waldorf School  
King’s Academy  
Kolbe Fund  
Kutztown University  
Kutztown University Foundation  
La Comunidad Hispana  
Lighthouse Youth Center  
Living Breath Foundation  
London Grove Friends Meeting  
Lord’s Pantry of Downingtown  
Lyme Disease Association of SE PA  
Make-A-Wish Foundation of Philadelphia  
Malvern Preparatory School  
Mary Campbell Center  
Maternal & Child Health Consortium  
Mill at Anselma Preservation  
Educational Trust  
Missionaries of Charity  
Moreau Catholic High School - Campaign for Champions  
National Exchange Club  
Natural Lands Trust  
Nature Conservancy  
Neighborhood Hospice  
New York City Relief  
New York Yacht Club Foundation  
Northeast Community Church  
Open Hearth  
Otho Davis Scholarship Foundation  
Owen J. Roberts Middle School  
Oxford Area Neighborhood Services Center  
Oxford Senior Center  
Paoli Hospital Foundation  
Parksburg Library  
Partners in Outreach  
Peacemaker Center  
Peirce College  
Pennsylvania Pennsylvania Home of the Sparrow  
Pennsylvania Parks and Forests Foundation  
People For People, Inc.  
People’s Pantry at Church Road  
Peter’s Place  
Petrzka Community Housing  
Philadelphia Friends of PHMC  
Philadelphia Young Playwrights  
Philanthropy Network Greater Philadelphia  
Phoenixville Area Children’s Learning Center  
Phoenixville Area Community Services  
Phoenixville Area High School  
Phoenixville Area Middle School  
Phoenixville Area Senior Adult Activity Center  
Phoenixville Community Education Foundation  
Phoenixville Women’s Outreach - The House  
Polaris Project  
Police Athletic League of Philadelphia  
Peter John Paul II Regional Catholic Elementary  
Pottsgrove Middle School  
Pottsgrove School District  
Pottstown Cluster of Religious Communities  
Primitve Hall Foundation  
Quaker City Farmers  
Radnor ABC  
Redeem  
Rhode Island College  
Riddle Health Care Foundation  
Rotary Club of Churchville  
Rotary Club of Thorndale  
Russell Byers Charter School  
Safe Harbor  
Sailing Foundation of NY  
Salvation Army of Greater West Chester  
Salve Regina University  
San Jose State Spartan Foundation for Football  
School at Church Farm  
SE PA Autism Resource Center  
SILO  
Snow Scientific Research Foundation  
Southern Chester County Day Care Association  
Special Olympics PA-Chester County Program  
St. Joseph School  
St. Mary’s Franciscan Shelter  
Stroud Water Research Center  
Sunshine Foundation  
Support Center for Child Advocates  
Tasit Foundation  
Team CMMD  
Temple University  
Thirteen/WNET  
To Love a Canine  
Tower Foundation of San Jose State University  
Trans World Radio  
Transition Dynamics Associates  
Tredyffrin & Easttown Care  
Triskelion Foundation  
UCLA Foundation  
Underground Railroad Project  
United for HER/Pink Invitational  
United Way of Chester County  
United Way of Southern Chester County  
University of Pennsylvania  
Upland Country Day School  
Upward Entertainment Alliance  
Valor Bowl c/o Believe & Achieve Foundation  
Villanova University  
Volunteer English Program  
Washington Gong Action Programs  
The Wentworth  
West Chester Area Senior Center  
West Chester Dance Works  
West Chester Downtown Foundation  
West Chester Parks and Recreation  
West Chester United Methodist Church  
West Chester University Foundation  
Westtown Goshen Rotary Foundation  
Wharton Esherick Museum  
WHYY  
William Alanson White Institute  
Williamson Free School of Mechanical Trades  
Willistown Conservation Trust  
Willistown Friends Meeting Educational Fund of the Trustees  
Willistownokehing Nature Center  
Willistown Township  
Wings for Success  
Wistar Institute  
Women’s Club of Downingtown  
Wounded Warrior Project  
YMCA Brandywine  
YMCA Jennersville  
YMCA Kennett Area  
YMCA Lionville Community  
YMCA of Greater Brandywine  
YMCA Upper Main Line  
Young Life Liberty Region  
Young Life of Richmond-West End  
Young Life Southern Counties  
Young Playwright’s Theater  
Youth Community Forward  
Youth Community Forward  
Youth Community Forward  
Youth Community Forward  
Youth Community Forward  
Youth Community Forward

CCCF GRANTS & SCHOLARSHIPS DISTRIBUTED = $2,000,097
7/1-6/30
As Senior Vice President and Trust Managing Director for Phoenixville Federal Bank and Trust since 1996, Kurt Kunsch is at the nexus of scores of wealth management and estate planning conversations. With a strong reputation for trust, integrity, and superior client service, clients are confident that Kurt puts their needs and desires first and foremost.

Kurt has a personal ethos of community service. A lifelong Chester County resident, Kurt is proud to discuss his civic endeavors. “Talking about nonprofit community volunteer projects helps break the ice, spread the word, and get people involved. Plus it lets me know if we should talk about charities in our estate planning conversations.”

Growing up, it was clear in the Kunsch household that community involvement was essential. “My Dad always instilled in us the importance of donating time and resources to assist others in need. Our family activities were centered on St. John’s Lutheran church, with tithing and weekly offerings, youth groups, and lots of volunteer projects. Plus I was a Boy Scout, a volunteer at Phoenixville Hospital, and I sang in the Boys Choir at Valley Forge. From an early age, I realized how great it feels to help others and be involved in the community.”

Kurt and his wife Kelly continue the strong tradition of family philanthropy with their three children Addison, Chloe, and Daxon. On their 5th birthday, each child receives the book *Three Cups: A Lesson in Life and Money for Children* by Tony Townsely and Mark St. Germain. This tradition was started by Kurt’s brother-in-law. *Three Cups* teaches basic financial planning and emphasizes responsibility, generosity, and the joys of reaching one’s goals. Three cups are given to each child to deposit money they receive from holidays, celebrations and allowances.

- One cup is for saving.
- One for spending.
- One for giving.

Kurt now gives *Three Cups* to his clients, for their children and grandchildren.

Kurt’s current charitable involvement is wide and deep. He serves as President of the Phoenixville Area Economic Development Corporation, Secretary for the Phoenixville Police Athletic League, and as a Board member of the Chester County Estate Planning Council. He has also served as Board Chair of Petra Community Housing, Secretary of the Schuylkill River Heritage Center, and Board Treasurer of the Historical Society of the Phoenixville Area. Kurt throws in extra entertainment at charity events, as a professionally-trained magician and Muhlenberg College theatre major.

“When my longtime friend David M. Frees III Esq. became Chair of the Board of the Community Foundation in 2004, of course I had to take a closer look. Dave has been instrumental as a career mentor, clarifying the trust and estates field for me. I saw that the Community Foundation has two sides – grantmaking from donor advised and unrestricted funds, as well as stewarding invested community assets for perpetuity. Over the years, I have personally seen the short-term and long-term impact the Foundation has made on nonprofits and families in the community.”

Kurt is clear that there are benefits for those who give charitably, as well as for those who receive. “It’s no magic to believe that the great feelings you experience from helping others are just as important as exercise and a healthy diet. The smile you receive from a child or a grateful person is one of the best feelings in the world. I enjoy helping my clients feel deeply satisfied about the impact they can make with their charitable dollars, now and forever.”

**DOOR OPENER HONOREES**

- 2004  Stephen McGann, CTFA, AEP
- 2005  L. Peter Temple, Esq.
- 2006  Michael B. Karwic, CFP, CRPC
- 2009  Honorable Dr. Clifford DeBaptiste
- 2010  William J. Gallagher, Esq.
- 2011  Duke Schneider, Esq.
- 2012  Robb S. Frees, CIC
- 2013  Richard Clark, CPA, CFP®, ChFC®
- 2013  Stephen Olsen, Esq.
- 2013  Timothy Knauer, Esq.
- 2014  Louis N. Teti, Esq.
- 2015  Kurt Kunsch
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 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    Moira & 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 Kunsch of Phoenixville
2015    Alice & Rodman Moorhead III of West Grove

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.
Can one person make a difference? Yes! And two? Doubly so. But in some instances, the synergy of one plus one equals so much more than two.

Nowhere is this synergy more evident than in the lives of Alice and Rod Moorhead, and the impact that they have had on the quality of life for all those who call Chester County home. Through their focused, deep and generous sharing of their time, talent and treasure, Alice and Rod help countless people in countless ways to have a better life, a healthier environment, and the hope of better tomorrow for themselves and their children.

Alice and Rod’s dedication to the welfare of our communities is exemplified by their leadership, hands-on participation, and charitable support of nonprofit causes that:
- help the most vulnerable, especially our growing number of Latinos, become stronger, contributing members of our communities
- offer educational opportunities for people of all walks of life
- sustain the beauty of our land, and the preservation and safety of our natural resources.

Alice and Rod reside on Buttonwood Farm, which has been home to Alice’s family since 1930. A Chester County native, Alice attended the Ethel Walker School in Connecticut. She earned her Bachelor’s Degree in Political Science from Vassar College where she wrote her thesis on the Mexican political system.

Alice worked in New York City for three years writing about political and economic conditions in Latin America before traveling throughout the region to experience first-hand the cultures and people of these countries. This trip ignited a lifelong interest and passion in helping Latinos. After earning her MBA from Columbia in 1974, she married her husband, Rod, who she met in Costa Rica. A native of Louisville, Rod attended the Taft School in Connecticut. He earned his BA in Economics from Harvard College and his MBA from Harvard Business School.

Alice and Rod raised two sons, Rodman IV and Clay, with frequent travels between their homes in Chester County, NYC, and their beloved Jackson, Wyoming. Rod had an extremely successful career at Warburg Pincus, a private equity and venture capital firm in New York City, which gave birth to companies such as Coventry Health Care, United Healthcare and many other highly successful companies. Throughout his career, Rod served as a Director on for-profit boards including 4GL School Solutions, AgrifDyne Technologies, Cambridge Neuroscience, Chancellor Beacon Academies, Coventry Health Care, ElderTrust, Hospital Corporation of America, New Providence Asset Management, NeXstar Pharmaceuticals, PhyCor, Scientific Learning Corp, Shire Human Genetic Therapies, Spectrum K12 School Solutions, Synergen, United Healthcare, U.S. Healthcare, Value Health, Vestar, and Xomed Surgical Products. After more than 30 years with Warburg Pincus, Rod retired as a Managing Director in 2006.

In 2001, Alice, never one to stay still, returned to formal education. At age 60 she earned her Master’s degree in Social Work from NYU. Alice then committed herself to taking on a local cause near and dear to her heart. While Alice gives generously to many nonprofits, at La Comunidad Hispana in Kennett Square, her philanthropic leadership is most evident. Recognizing the importance of Latinos to the economic welfare of our communities, Alice is clear that new immigrants and vulnerable families must have the resources and support they need to become strong, healthy contributing members of the community.

When Alice first became involved in 2004, LCH was struggling with inadequate facilities, continual financial instability and an uncertain future. Realizing the scope of stabilizing and growing LCH, Alice placed many of her interests, social activities and involvement in other organizations on hold to focus her attention on LCH. Now, more than a decade later, Alice’s intervention, leadership and support have made a crucial impact:
- New Facility: In 2007, Alice spearheaded the effort to develop facility plans that would bring healthcare, social assistance, education and support services together under one roof in a modern, fully-equipped LEED certified building, which opened in 2009.
- Campaign Leadership: To successfully fund the new facility, Alice partnered with Betty Moran, serving as Co-Chairs of LCH’s first-ever capital campaign. Several years later, she agreed to Chair LCH’s Fortyforward Campaign.
- Community Engagement: As Development Committee Chair, Alice engages the support and participation of friends and community leaders to build and sustain LCH.
• Strong Governance: Alice served as LCH’s Board Chair from 2010 to 2013 during times of great change and phenomenal growth.

• Program Expansion: In 2012, while Alice was Board Chair, LCH was designated a Federally Qualified Health Center. LCH also achieved the prestigious status of a Level 2 Patient-Centered Medical Home. In 2015, LCH will open a new health center in Oxford. Today, LCH’s health center annually cares for 3,000 people in 9,500 patient visits and 2,700 people receive social assistance and participate in educational programs. Recently, 12,000 people were enrolled in Health Insurance Marketplace. Through Alice’s volunteer leadership, LCH is a modern health and social services center that has become a mainstay in the community.

Rod’s philanthropic pursuits focus on a strong belief in the value of education and a pressing concern for the environment.

Rod’s support of scholarship programs, schools, colleges, and community-based educational programs both locally and beyond are a testament to his unwavering commitment to the value of learning. In fact, Rod credits his personal success to the strong foundations instilled in the schools he attended. In his desire to “give back,” he has made extraordinary gifts to Harvard College, Harvard Medical School, and the Taft School. In 2012, Rod was awarded the prestigious Horace D. Taft Alumni Medal, the Taft School’s highest honor given to a graduate whose life work best exemplifies the school motto: Non ut sibi ministretur sed ut ministret... Not to be served, but to serve.

An avid environmentalist and outdoorsman, Rod is also passionately committed to the preservation of natural resources, the health and safety of water, and the conservation of open space. His leadership, commitment and most generous support helps assure that Chester County remains a beautiful, safe, healthy and environmentally friendly place to live, work and enjoy. His accomplishments are many:

• Stroud Water Research: As Chair, Rod provides leadership and philanthropic support to this internationally renowned research facility which studies and understands the ecology of streams, rivers and their watersheds, both pristine and polluted.

• In 2012, Stroud Water Research dedicated the Moorhead Environmental Complex in honor of Rod’s many years of Board leadership and his extraordinary philanthropic support. The new facility was awarded LEED Platinum certification, the highest level awarded by the U.S. Green Building Council for the design, construction and operation of high performance green buildings. The new education and outreach center brings together Rod’s two interests of education and the environment. Today, hundreds attend camps and programs focused on the importance of clean water to our environment and to our lives.

• Brandywine Conservancy: Rod’s leadership as a member of the Board and most generous support has been instrumental in helping to protect and preserve 62,000+ acres of the Brandywine Valley.

This is just a tip of the iceberg.

As a team, Alice and Rod are consistent, generous, leadership donors to annual and capital campaigns of Community Volunteers in Medicine, Chester County Hospital, Chester County Food Bank, Handi-crafters, and Thorncroft Equestrian Center. They are also annual donors to After The Bell, Anson B. Nixon Park, Brandywine Health Foundation, Brandywine Valley Association, Carter CDC, Chester County Community Dental/ChesPenn, Chester County Fund for Women & Girls, Chester County Historical Society, Domestic Violence Center of Chester County, Family Promise, The Garage, Maternal Child & Health Consortium, United Way of Southern Chester County, and Upland Country Day School.

Whether it is addressing the needs of vulnerable populations, promoting a healthy environment, assuring access to quality healthcare, providing opportunities for education, or simply doing a kindness for someone in need, Alice and Rod remain true to the Taft credo: Not to be served, but to serve.
The Community Foundation currently is entrusted with **350 funds**. The **24 newest funds** are in colored print.

The average fund size is $135,000.

<table>
<thead>
<tr>
<th>CCF Funds</th>
<th>Inception Date</th>
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<td>CCF Grantmaking Fund for Chester County, 1998</td>
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<td>CCF NP C4 Capacity Building Fund, 2010</td>
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<td>CCF Operating Endowment at Susquehanna, 2012</td>
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<td>CCF Operating Endowment Honoring Frances Richards Pyle, 2012</td>
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<td>CCF Youth Philanthropy Program at Great Valley High School, 2005</td>
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<td>CCCC Youth Philanthropy Program at Westtown School, 2007</td>
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<td>Donor Advised Funds Anonymous (2)</td>
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<td>4KiddSYC Charitable Fund, 2010</td>
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<td>Aaron &amp; Jean Martin Fund, 1994</td>
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<td>Clay-Mir Charitable Foundation, 2007</td>
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<td>Connor T. Schmidt Foundation, 2001</td>
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<td>Dalley Family Foundation, 2015</td>
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<td>Daryl E. &amp; Martha J. Thomas Foundation, 2015</td>
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<td>DeBaptiste Foundation, 2010</td>
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<td>Dianne &amp; Dave Elderkin Charitable Fund, 2013</td>
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<td>Dick &amp; Jane Kunsh Family Foundation, 2014</td>
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<td>Don Gregory Stout Memorial Outreach Endowed Fund, 2014</td>
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<td>Edward H. &amp; Dorothy K. Dickel Foundation, 2006</td>
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<td>Marvin &amp; Shirley Porter Educational Foundation, 2009</td>
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<td>Mesothelioma and Asbestos Disease Society Charitable Fund, 2004</td>
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### SCHOLARSHIP FUNDS

- Alice Lawson Scholarship Fund, 1998
- M. Thomas Scholarship Fund, 1998
- Brianne Carter Memorial Scholarship Foundation, 1999
- Carl O. Benner Scholarship Foundation, 2001
- Carl Schnellenbach Wrestling Scholarship Fund, 2001
- Caroline Gallagher Cranston Memorial Scholarship Fund, 2011
- CCEPC Marc P. Riddell Memorial Scholarship Fund, 2001
- Charles A. Melton Scholarship Fund, 1998
- Alan G. Elko Legacy Scholarship Fund, 2000
- Dr. Gerald E. Clark Memorial Scholarship Fund, 2008
- Dr. W.T.M. Johnson Memorial Foundation, 1999
- Dr. John H. Hewlett, III Scholarship Fund, 1999
- Dr. Joseph J. D'Amico, Sr. Scholarship Fund, 2010
- Dr. Robert & Doris Hanna Scholarship Fund, 2003
- Dr. Robert & Karen Rigg Scholarship Fund, 2013
- Dr. W.T.M. Johnson Memorial Foundation, 1999
- Drew McWilliams, Jr. Scholarship Fund, 1998
- East End Neighborhood Association Scholarship Fund, 2009
- Eugene J. & Mary DiFilippo Scholarship Fund, 1999
- Front Porch Trust Fund Scholarship, 2005
- George W. Martin, Jr. Scholarship Fund, 2000
- Halliday Clark, Sr. Memorial Scholarship Fund, 1998
- Harry Dunn Art Scholarship Fund, 2001
- Hon. Dr. Elnor & William Taylor Scholarship Fund, 2004
- Jeffrey A. Wheat Memorial Scholarship Fund, 2011
- Jeffrey Gaunt Memorial Scholarship Fund, 2008
- John & Mary DiCecco Scholarship Fund, 1999
- John Hay Memorial Scholarship Fund, 2010
- Joseph J. D’Amico, Sr. Memorial Foundation, 2010
- Julius “Bud” & Dorothy Elberfeld Foundation, 2010
- Kappa Psi Pharmaceutical Fraternity ETA Chapter Legacy Fund, 2013
- Karen L. Mapes Memorial Scholarship Fund, 2013
- Karrin Field Memorial Scholarship Fund, 2005
- Kelly Ann Foundation, 2013
- Kenneth Education Foundation Angel Scholarship Fund, 2009
- Laura Meikle Koch Drew University Scholarship Foundation, 2013
- Lauren’s Heart Scholarship Foundation, 2011
- Leon Bell Scholarship Fund, 2011
- Lucinda P. Wallace Memorial Scholarship Fund, 2002
- Manor Avenue Scholarship Fund, 2014
- Maria Whitehead Memorial Scholarship Fund, 2010
- Natalie A.W. Leaf Charitable Fund, 2001
- Nicholas R. MacElree Scholarship Fund, 2008
- Patricia B. Dixon Scholarship Fund, 2009
- Peoples First Scholarship Fund, 2004
- Quaker City Farmers Scholarship Fund, 2001
- Raymond Montoni Music Scholarship Fund, 2001
- Rotary Club of Coatesville Educational Fund, 1998
- Ruch Family Scholarship Fund, 2011
- Schramm Scholarship Fund, 2005
- Stanleys Dream Scholarship Fund, 2010
- Susan DeCecco Scholarship Fund, 1999
- Susan Romano O’Brien Science Scholarship Foundation, 2009
- Sweet Jane’s Wish Foundation, 2012
- Vicky Ahlum Memorial Scholarship Foundation, 2006
- William J. Lordon Scholarship Fund, 2008
- West Chester Henderson Class of 1953 Scholarship Fund, 2008
- Westtown Goshen Rotary Richard Hodgson Education Foundation, 1999
- William’s Wish-William Vincent Memorial Scholarship Fund, 2009
- YPTC Excellence in Accounting Scholarship Fund, 2005

### CCF FAMILY OF FUNDS % OF ASSETS

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<td>22%</td>
<td>6%</td>
<td>8%</td>
<td>20%</td>
<td>2%</td>
<td>48%</td>
<td>48%</td>
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To create your legacy fund, contact Donor Services at (610) 696-8045 or info@chescocf.org.

The minimum contribution to establish an endowed fund is $25,000.

- Average endowed fund size = $335,253
- Average donor advised fund size = $163,667
- Average nonendowment fund size = $111,254

### 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

- Lauren J. Becvar, Ph.D.
- Henry S. Beiber, Jr.
- Elsie Bonner
- Elizabeth Boys
- Michael Jay and Elizabeth Harper
- Leslie B. Schramm
- Karen A. Simmons
- Barbara Sunday
- Gustave & Anne Teipelke
- Craig Lincoln Tucker
- Richard A. Kunsch, Sr.
- Josiah H. Hibberd
- Frances T. Herron
- David & Robin Frees
- Harold Freeman
- Ronald Fletcher
- Deborah Francis
- Frances T. Herron
- Josiah H. Hibberd
- Richard J. Hutton
- Richard A. Kunsch, Sr.
- Carl & Sylvia Landis
- Ida Mae Large
- Zelinda LeBoutillier
- Jack Lowery
- Bronwen L. Martin, Ph.D., MBA, CFSP, CRPC, CMFC, CHFC, AEP

Anonymous of Media
Anonymous of Mendenhall
Anonymous of New York City, NY
Anonymous of Paoli (3)
Anonymous of Parkesburg
Anonymous of Phoenixville (4)
Anonymous of Princeton, NJ
Anonymous of Spring City
Anonymous of West Chester (21)
Anonymous of West Grove (2)
Anonymous of Wilmington
Anonymous of Wynnewood
*deceased*
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.

**TYPES OF FUNDS**

**CCCF 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 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.

**Future 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 **Emerging Philanthropy** 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—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 Beth Harper Briglia, Vice President (610) 696-8045

Any gift amount can be added to existing funds.

Grants awards are made to bona fide nonprofit causes throughout the United States.
On Sunday, November 1, 1992, 49-year-old Neil Clarence Joines of Kennett Square, a sales executive and active community leader, died at Chester County Hospital after a two-year battle with pancreatic cancer.

Neil was born in West Grove. A 1960 graduate of Kennett High School, Neil was co-editor of his class yearbook and portrayed the lead character in the senior play. After attending Penn State University, in 1965 he graduated from the University of the Americas in Mexico City with a bachelor’s degree in Spanish language and literature.

In 1969, Neil married Edythe Layton Denny at St. Asaph’s Church in Bala Cynwyd. Edythe remembers, “Neil squeezed 25 hours out of each 24 hour day. ‘It’s only ten o’clock’ he would say at one in the morning, having lost all track of time and meaning to stay up another hour or two. There were so many arias and symphonies to hear, so many people to keep in touch with, and so many things to discover.”

SP/4 Joines served in the Army Reserve while he was employed by Pan American World Airways from 1965 to 1972 as a sales representative at Philadelphia International Airport. He taught at Pan Am’s training school in Philadelphia and received an outstanding customer service award from Pan Am.

According to Edythe, “Neil was excited by travel. He took advantage of every trip and low-cost fare he could find. He traveled the world getting ideas, meeting people, and making friends. He was so inquisitive about everything, and so curious. He loved life, and he loved to travel and keep in touch with people. He was always, ‘Go, go, go!’ with boundless energy and passion for life. Such a great sense of humor—he would make people laugh. You can get a lot done when people laugh with you.”

Neil certainly got a lot done.

In 1972-73, Neil was district sales manager of the Philadelphia office for the Mexican airline Aeronaves de Mexico. He was instrumental in opening the office, hiring the staff and setting up flights from Philadelphia to Mexico City and Acapulco.

Neil was born in West Grove. A 1960 graduate of Kennett High School, Neil was co-editor of his class yearbook and portrayed the lead character in the senior play. After attending Penn State University, in 1965 he graduated from the University of the Americas in Mexico City with a bachelor’s degree in Spanish language and literature.

In 1969, Neil married Edythe Layton Denny at St. Asaph’s Church in Bala Cynwyd. Edythe remembers, “Neil squeezed 25 hours out of each 24 hour day. ‘It’s only ten o’clock’ he would say at one in the morning, having lost all track of time and meaning to stay up another hour or two. There were so many arias and symphonies to hear, so many people to keep in touch with, and so many things to discover.”

SP/4 Joines served in the Army Reserve while he was employed by Pan American World Airways from 1965 to 1972 as a sales representative at Philadelphia International Airport. He taught at Pan Am’s training school in Philadelphia and received an outstanding customer service award from Pan Am.

According to Edythe, “Neil was excited by travel. He took advantage of every trip and low-cost fare he could find. He traveled the world getting ideas, meeting people, and making friends. He was so inquisitive about everything, and so curious. He loved life, and he loved to travel and keep in touch with people. He was always, ‘Go, go, go!’ with boundless energy and passion for life. Such a great sense of humor—he would make people laugh. You can get a lot done when people laugh with you.”

Neil certainly got a lot done.

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Neil owned El Tianguis, a gift shop that featured Mexican goods, from 1968 to 1976. Then, he was part of Neil & O’Neill, a similar gift shop, from 1976 to 1982. From 1984 to 1988, he co-owned and operated Kennett Trading Co., yet another gift shop. From 1979 on, Neil served as co-owner and president of Kennett Travel.

In 1986, he became president and a director of Kennett Communications Corp. He was one of the founding partners, as well as a columnist and music critic for the Kennett Paper.

A member and a director of the Kennett Area Jaycees, Neil also was a member of the Kennett Square Rotary Club; Kennett Borough Planning Commission; Southeastern Chester County Chamber of Commerce; and Kennett Square Retail Merchants Association, where he had been president, vice president and a director. He was a long-time board member of the Kennett Symphony Orchestra. Neil conceived and led the Kennett Arts Festival.

Neil was known by those in Kennett’s Latino community as “the travel agent who speaks Spanish.” Neil said he studied Spanish at Kennett High School and at Penn State University because he planned to live and work in Latin America. Neil noted that it was in Mexico at the University that he learned to love the world…”the whole marvelous, exhilarating, unusual, wonderful world, full of people and places to discover” in 1991, Neil was quoted in the Philadelphia Inquirer, saying, “If you’re not able to communicate in Spanish around here, you’re missing the boat completely. You shouldn’t miss any experience life has to offer.”

In February 1992, the Kennett Square Area Business Association presented Neil with its Outstanding Achievement Award, with “appreciation for his dedication to the arts and years of service to the Kennett Merchants Association and area organizations.” Neil modestly accepted a plaque and the praise of his peers at the Kennett Symphony Orchestra’s winter concert. The tribute hailed Neil as a “community activist extraordinaire.” Kennett Paper publisher Jamie Blaine told the symphony audience, “Neil has contributed abundantly to the spirit and culture of the Kennett area; and more recently has provided a role model for hundreds of people who choose to stand up to cancer.”

At the time of his death in 1992, Neil was survived by Edythe Layton Denny Joines; his mother Marie McMillan Joines Cleaves; his dog Asta; and his friend William F. Ering of Sewell, New Jersey.

Neil had a vast array of personal interests. He lived an extremely full and complex life. “Neil lived the life of two people,” said a friend at his funeral service. One would be hard-pressed to guess how he would want his estate allocated. Because of Neil’s advance estate planning with L. Peter Temple Esq. of Larmore Scarlett law firm of Kennett Square, we know.

THE NEIL JOINES FUND
Transferred to CCCF in 2015

Who was Neil C. Joines? What did he care about? How did he want to be remembered?

Neil’s legacy lives on in the NEIL JOINES FUND, which was established in 2015 in the name of Neil C. Joines. The fund’s mission is to support the arts and other community projects that contribute to the cultural and economic vitality of the Kennett Square area.


Neil owned El Tianguis, a gift shop that featured Mexican goods, from 1968 to 1976. Then, he was part of Neil & O’Neill, a similar gift shop, from 1976 to 1982. From 1984 to 1988, he co-owned and operated Kennett Trading Co., yet another gift shop. From 1979 on, Neil served as co-owner and president of Kennett Travel.

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“Neil squeezed 25 hours out of each 24 hour day.”
- Edythe Joines
The members include:

Paul B. Redman, Longwood Gardens
Jeffrey S. Darman, Borough of Kennett Square
Michael E. Elling (2013) and Scudder G. Stevens Esq. (2014), Kennett Township

The Trustee and the original members of the Joines Fund came to feel that it was impracticable and wasteful to continue as a private Foundation. They debated whether to pay out the entire amount and close the Joines Fund. But that didn’t seem quite right as a way to honor Neil’s legacy. Yet the administrative costs seemed too high, the returns too low, and the grantmaking process felt scattered and burdensome to improve. “Not how Neil would have liked,” said one member.

The members agreed to consider another path to ensure Neil’s legacy, exploring whether the Community Foundation could be entrusted to carry forth the charitable purposes of the Joines Fund with less administrative costs and more local arts and culture knowledge.

In 2014, Wells Fargo consented to transfer the trust to DNB First. The legal work to do so was completed in 2015. DNB First became a Gold Medallion Investment Partner of the Community Foundation.

L. Peter Temple Esq. explains, “It just made sense. This high six figure fund wasn’t large enough to get personal attention from a national investment entity. Yet locally, people at the Community Foundation have a heartfelt passion to help make great grants and grow the investment to benefit the Kennett region.”

Neil’s Will was clear:

“If my mother, Marie Joines Cleaves survives me, I give her a life estate in my current home on Nute’s Farm Lane in Kennett … plus … I direct the Trust I created to pay for her health, education and support during her lifetime.”

“I give unto my friend, William F. Errig of Sewell, NJ, a life estate to use and enjoy my cottage in Rehoboth Beach, Delaware during his lifetime.”

Neil’s Will also directed that upon his mother’s death and his friend William’s death, “the property shall be sold and added to the residue of my estate.”

Furthermore, Neil directed that the income from his trust “be distributed, on an annual basis, by a charitable committee to be known as the Joines Fund.” Neil named Meridian Trust Company (succeeded by Wells Fargo Bank, N.A.) as Trustee.


Neil’s Will clearly states three purposes for his charitable trust:

1. to expose the Kennett community area to a diverse sampling of cultural opportunities; hopefully supporting musicians and artists, ideally from the Kennett Square area, to perform locally;

2. to pay for musicians, provide honoraria to artists, provide scholarships to worthy students, or pay awards or prizes to winners of local competitions…to make sure that piano, art and drama competitions be continued for young people who live in the Kennett Square area.

It was also Neil’s expectation that:

3. some of the annual income supports the Kennett Symphony Orchestra by paying soloists or other performers. This is in addition to, and not a supplement to, its operating budget.

In his Will, Neil specifically directed that the Joines Fund be administered by three members, who would serve no more than two years. Each would be appointed annually by the:

#1 Board of Directors of Longwood Gardens
#2 Borough of Kennett Square Borough Counsel; and
#3 Supervisors of Kennett Township.

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Why would a country club give over a half-million dollars to nonprofits? Just ask any member of Whitford Country Club, and you’ll find answers.

Whitford was founded based on generosity. In 1955, Al Ostheimer generously gifted 168 acres to “share the sporting experience with community neighbors.” To determine what to do with the land, 60 people gathered. After much discussion of options, it was decided that the land would be used for golf, tennis and swimming. The farmhouse and barn would become clubhouses.

In 1956, the first nine holes were completed for the golf course. On Memorial Day 1957, the second nine holes, swimming pool, and tennis courts opened.

It turns out that Whitford’s members are a generous group of people who provide time, money and resources to charitable causes. Many of Whitford’s members serve on nonprofit boards and committees throughout the region, and roll up their sleeves to do volunteer work.

For 32 years, the Whitford Pro-Am was a widely known, well-attended golf tournament that took place the second weekend in September. When the outside organizers decided to move the event, Whitford had a decision to make: either open up that weekend to its own members, or begin a new event which Whitford would fully “own.”

As with any club, members had a diverse array of opinions. Numerous discussions were held and ideas abounded. Several Club Board Members led the call to “do something different... something that was inspiring and would make Whitford stand out.” A core group of visionaries met over a drink at the clubhouse and conceived the Whitford Charitable Fund concept, which centered around the idea of raising funds for Chester County beneficiaries while having fun.

Explains Bruce Hockman, one of the visionaries, “Instead of focusing on putting big prize money together for some Pros, we hit on the idea of putting the money together for nonprofits that do good community work. The whole focus of the event changed, while the Pro-Am part and gala dance part stayed the same.” The group presented the idea to the Whitford Board of Directors. In 2010, the Whitford Charitable Fund Committee was born, for the purpose of “Giving Something Back” to Chester County nonprofits.

Past and current members of the Whitford Charitable Fund Committee include Lynn Bevevino, Kim Brumbaugh, Bill Cain, Bob Gorr, Gwynne Gorr, Ed Hart, Bruce Hockman, Peter Hoover, Larry Kelly, Tom Myles, George Powers, Maryanne Parsons, Steve Seide, Daryl Tunno, James Terry, Lou Tett and Michael Williams.

The Charitable Fund Committee designed a signature fundraising event that played to the strengths of Whitford’s members: love of fun, sports, food and drink. Over the last few years, the Whitford Charitable Fund Classic has developed into a fun-filled, weekend after Labor Day event:

- **Friday**: Women’s Tennis Classic Tournament, Gala Dinner, Dance & Auction (live & silent)
- **Saturday**: Men’s Tennis Classic & Whitford Classic Golf Sponsors’ Tournament

“Instead of focusing on putting big prize money together for some Pros, we hit on the idea of putting the money together for nonprofits that do good community work.”

- Bruce Hockman
The Whitford Charitable Fund at the Community Foundation is "a "Give Something Back" kickoff in July, a one-day golf outing designed to reach even more friends of the nonprofit beneficiaries, and introduce them to Whitford while raising additional charitable funds.

While organizing the first event in 2011, the members soon ran into a bit of a roadblock. Jim Terry, Chairman of the Whitford Charitable Fund explains, "We were excited about getting our first Whitford Charitable Fund Classic off the ground in September 2011. We certainly knew how to get members and their friends together to golf, swim and play tennis; and to dance, eat and drink. But we discovered that the back-office administrative work was more than our committee volunteers could easily take on."

Adds Jim, "We didn't have the desire nor the time to secure our own 501(c)(3) status. And no one was real thrilled about doing the banking, keeping the bookkeeping accounts, or generating contribution receipts.

When Lou Teti Esq., a Whitford Charitable Fund Committee member, introduced us to the Community Foundation, we decided to sign up with the Foundation because of its "full service offerings."

The Whitford Charitable Fund at the Community Foundation is administered in two parts: a short-term provisional fund which houses the annual event income and expenses; and a long-term quasi-endowed fund. Started by an anonymous donor, the quasi-endowed funds are invested for the long-run, so the intent of the Whitford Charitable Classic can continue forever. The process gets more difficult every year. It's hard to say 'no' to good people who do good work."

In his opening comments at Whitford's 2014 Classic Gala, Sheldon Yellen, CEO of Presenting Sponsor Belfor USA, reminded members, "We can all make a difference in a person's life, if we take the opportunity to do so."

Jim Terry sees a lot of opportunity for the future. "We have a young membership at the Club, which is good. The Whitford Charitable Fund Classic gets them engaged. They soon find that it's more than just a party. This year, the golf sold out right away, our aquatics members are now involved in a fund raising Swim-A-Thon, and men's and ladies' tennis events were a great success. So many more people have become engaged, and they find ways to 'give something back' and help others. In addition to the event, people learn more about charities in their backyard. And now we've seen more people volunteering for local charities. They're involved in community service year round."

Grants are only awarded to nonprofits that provide a majority of services to residents of Chester County. It's a competitive grant award process, befitting a sport-based fundraiser. As Bruce points out, "The Grants Committee likes to focus on nonprofits with budgets under $1 million, because we believe the money can go a longer way and have a larger impact."

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Where does the Whitford Charitable Fund Classic go from here? Founding organizer Jim Terry has an idea. "Maybe there is a way to take this to other Clubs and get them involved. We have a model. With other Clubs, we could make this a Chester County thing. Maybe we all pick one day for all the Clubs to Give Something Back and make it a regional initiative."

Bruce Hockman enthuses, "There are lots of reasons to join a country club. We have found, more often than not, people want to help others. There is an excitement, an electricity, and a synergy that comes from doing good works, and doing good works together. At Whitford, we pride ourselves on being a community of friends. If we can get the Club to think that giving something back is part of the membership deal at Whitford, then we will have gotten something right. It's a good thing to do."

To learn more about the Whitford Charitable Fund Classic and how you can play a part in "Giving Something Back", visit http://www.whitfordcc.com/WhitfordCharitableFund

Grants since inception include:
- Aidan’s Heart Foundation
- Camp Hill Special School
- Chester County Community Foundation Grant Fund for Chester County
- Chester County Food Bank
- Chester County Futures
- Chester County Hero Fund
- Chester County Public Safety Training Foundation
- Chester County SPCA
- Coatesville Youth Initiative
- Domestic Violence Center of Chester County
- Downingtown Area Senior Center
- Downingtown Library
- Family Lives On (formerly Mommy’s Light Lives On)
- Good Works
- Home of the Sparrow
- Hope Springs Equestrian Therapy
- Interfaith Housing Assistance Corporation of Chester County
- Lord’s Pantry of Downingtown
- Maternal & Child Health Consortium of Chester County
- Partners in Outreach
- Phoenixville Area Children’s Learning Center
- Safe Harbor
- SE PA Autism Resource Center
- Wings for Success

Whitford photos courtesy of David James Photography.
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 $3,665,185 from 2,553 donors.

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Eleanor Duda
Easttown Library Foundation
Finsbury, LLC
Joseph M. & Julia Fisher
Fox Family
Gretchen Frascella
C. Herbert Fry
GE Foundation
James H. Geddes
In Memory of Ruthann Graf
Edward F. & Regina Guza
Lawrence J. Harris (deceased)
Suzan M. Harris
Marcia C. Herrick
Brendan & Andrea Howard
Scott & Yandy Jenkins
Helen K. & Arthur Johnson Foundation
Kenneth W. & Margaret Rose G. Kistler
Susie & Peter Klein
David & Lisa Knight
Roman & Laura Koropey
Dennis P. & Mary Leeper
Judy Lupinski
In Memory of Larry Harris
Craig & Kathy Lewis
Robinson Literary Works, LLC
The Mackenzies
Dr. David and Christine R. Marable
Richard Malcolm
Tim & Terri Martin
William C. Martindale
Harry B. & Sharon Ann McCormick
Suzanne Metz
Ronald L. Mintz & Jessica L. Cahen Mintz
Kathryn L. Nothacker
Windy & Jim Oram, Jr.
W. Carl & Loreta C. Perhies
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Elise & George Rayl
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In Memory of Hollis Reed
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Marcie & Karl Romberger, Jr.
Barbara T. Rowe
Linda & Jeff Ruhlman
Julie S. Schwartz
Alan J. Silverman & Claudia Wissert-Silverman
In Honor of Jerry Spinelli
Charles P. Stone
Annette M. Thompson
Tredyffrin Easttown Historical Society
Jack & Nancy Trimmer
Rock & Valerie Vitale
Estate of William F. Ward
Barbara A. Whiteside
Mr. & Mrs. Graham Williams
Walter C. & Judith J. Williams
John & Barbara Woodcock
Jean & Dick Wright
Holly & Skip Yohe
Andrew S. Youman & M. Ellen Quinn
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Mr. & Mrs. Edward Dickel
Eleanor & James Latta, Jr.
Scholarship Fund
Mr. & Mrs. Francis Granieri
Mr. & Mrs. James Latta, III
Mr. John W. Latta
Mr. & Mrs. Peter A. Latta
Ms. Sarah Latta
Mr. & Mrs. William P. Latta
Elizabeth G. Dorsett Memorial Scholarship Fund
Mr. & Mrs. David G. Dorsett
Ms. Julia Dorsett
Emily’s Dash Fund
Anonymous
Mr. & Mrs. William J. Bauernschmidt
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Elizabeth Ranney Moran
Susquehanna Trust & Investment Company

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Larmore Scarlett
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Iron Valley Wealth Management
Manito Abstract Company
Merrill Lynch-Snelling/Karakelian
The Merz Group
Pegasus Technologies
Precision Realty Group
Umbreit, Korengel & Associates

SWEET CHARITY IN-KIND CONTRIBUTORS

SITE SPONSOR
William H. Bunch Auctions & Appraisals, Sweet Charity Host

DESSERTS
Most Creative: General Warren Inne - S'mores Brownie
Healthiest: New Street Catering - Avocado Tequila Lime Ice Cream & Double Chocolate Avocado Ice Cream
Best Dessert-Popular Vote: Delightful Desserts and Culinary Creations - Citrus Triple Play
Best Dessert-Professional Judges Vote: John Serock Catering - Spiced Apple and Rhubarb Taco
Cakes and Candies by Maryellen - Raspberry Love Stout Flourless Torte

Gemelli Artisanal Gelato & Dessert Café - Chocolate Tenerina Cake
The Lincoln Room - Lemon Cheesecake with Lemon Curd, Bread Pudding & Crème Anglais
MacDougall's Irish Victory Cakes - Celtic Kabobs
The Master's Baker - Pink Champagne Torte
Mile High Steak and Seafood - Ultimate Coconut Cake

SWEET CHARITY PROFESSIONAL JUDGES
Mary Bigham, thetowndish.com
Albert Lauber, Neuchatel Chocolates
Dee Rogevich, PA Restaurant Association

GUEST SWEET PARTING GIFTS
Courtesy of Albert Lauber, Swiss Chocolatier,
Neuchatel Chocolates

MEDIA SPONSORS
BrandywineRadio.com
Chester County Press
County Lines Magazine
Daily Local News
The Kennett Paper
Main Line Today
thetowndish.com

THANKS TO OUR 30+ SWEET VOLUNTEERS
Victoria Gardens Auxiliary
West Chester University Abele Society
West Chester University Friar Society
+ all our former Community Foundation interns who return to lend a hand
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 (defined below).
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

<table>
<thead>
<tr>
<th>ASSET CLASS</th>
<th>BENCHMARK</th>
<th>ENDOwed RANGE</th>
<th>QUASI RANGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Assets</td>
<td>ACWI ETF</td>
<td>35% - 70%</td>
<td>30% - 65%</td>
</tr>
<tr>
<td>Absolute Return Assets</td>
<td>Cash + 5%</td>
<td>10% - 25%</td>
<td>10% - 20%</td>
</tr>
<tr>
<td>Real Assets</td>
<td>HC Commodities Index/TIPS ETF/REIT/ETF</td>
<td>10% - 25%</td>
<td>10% - 20%</td>
</tr>
<tr>
<td>Fixed Income Assets</td>
<td>BarCap Agg ETF</td>
<td>10% - 40%</td>
<td>10% - 55%</td>
</tr>
</tbody>
</table>
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

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.
## FINANCES

**CHESTER COUNTY COMMUNITY FOUNDATION**

**STATEMENTS OF FINANCIAL POSITION** as of June 30

Audited by Umbreit Korengel & Associates

To obtain a copy of the audit or IRS 990, contact the Foundation.

(610) 696-8211 or info@chescocf.org

### USES OF FUNDS

**MANAGEMENT & ADMINISTRATION**

7%

**FUNDRAISING**

2%

**GRANTS & PROGRAMS**

91%

---

### ASSETS

<table>
<thead>
<tr>
<th></th>
<th>AUDITED 2015</th>
<th>2014 RESTATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; cash equivalents</td>
<td>$2,877,150</td>
<td>$4,089,990</td>
</tr>
<tr>
<td>Unconditional promises to give, net</td>
<td>55,208</td>
<td>112,498</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>14,903</td>
<td>11,625</td>
</tr>
<tr>
<td>Loan receivable</td>
<td>-</td>
<td>250,000</td>
</tr>
<tr>
<td>Certificates of deposit</td>
<td>930,278</td>
<td>967,209</td>
</tr>
<tr>
<td>Marketable securities</td>
<td>44,187,618</td>
<td>41,632,021</td>
</tr>
<tr>
<td>Property &amp; equipment, net</td>
<td>443,437</td>
<td>489,480</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$48,508,594</td>
<td>$47,552,823</td>
</tr>
</tbody>
</table>

### LIABILITIES

<table>
<thead>
<tr>
<th></th>
<th>AUDITED 2015</th>
<th>2014 RESTATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts payable &amp; accrued expenses</td>
<td>$70,893</td>
<td>$102,663</td>
</tr>
<tr>
<td>Annuities payable</td>
<td>349,186</td>
<td>276,305</td>
</tr>
<tr>
<td>Not-for-profit endowments</td>
<td>4,944,165</td>
<td>4,730,318</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$5,364,244</td>
<td>$5,109,286</td>
</tr>
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</table>

### NET ASSETS

<table>
<thead>
<tr>
<th></th>
<th>AUDITED 2015</th>
<th>2014 RESTATED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted-board designated</td>
<td>$43,089,142</td>
<td>$42,331,039</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>55,208</td>
<td>112,498</td>
</tr>
<tr>
<td><strong>TOTAL NET ASSETS</strong></td>
<td>$43,144,350</td>
<td>$42,443,537</td>
</tr>
</tbody>
</table>

**TOTAL LIABILITIES AND NET ASSETS**

<table>
<thead>
<tr>
<th></th>
<th>AUDITED 2015</th>
<th>2014 RESTATED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$48,508,594</td>
<td>$47,552,823</td>
</tr>
</tbody>
</table>

---

“’No act of kindness, no matter how small, is ever wasted.’” — Aesop
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Chair

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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.

Special Thanks
The Community Foundation Board acknowledges the dedicated service of Meghan McVety, Imprints Founding Chair, whose term expired June 30, 2015.
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Connecting people who care with causes that matter, so their philanthropy makes a difference

NOW AND FOREVER.