



Chester County COMMUNITY FOUNDATION

Connecting People Who Care with Causes that Matter.

The Lincoln Building | 28 W. Market Street | West Chester, PA 19382

610.696.8211 | www.chescocf.org | info@chescocf.org

Credits

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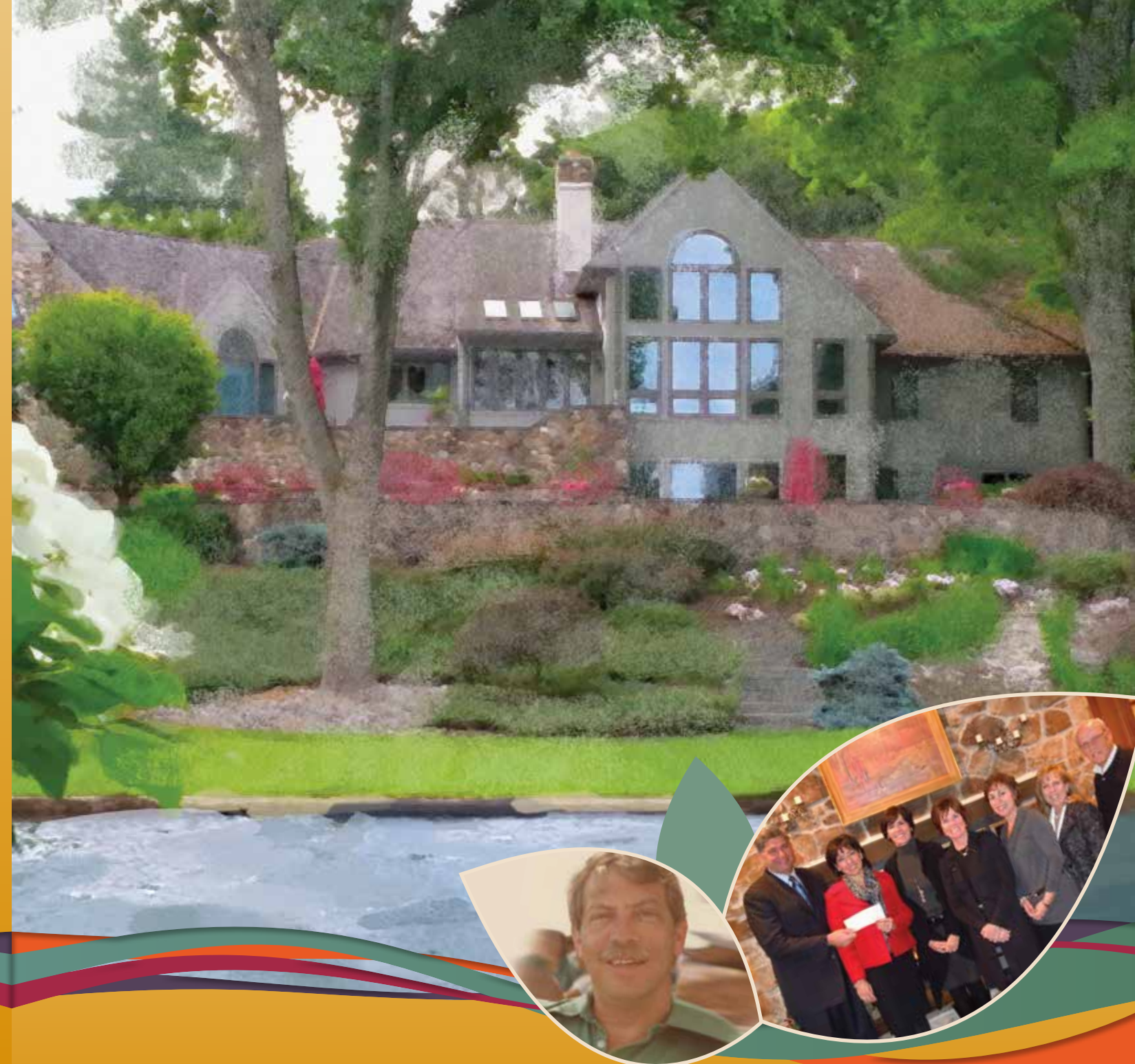
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Front Cover: Loew home, courtesy of Patricia Loew

Front Cover Insets: Neil Joines Charitable Fund, Whitford Charitable Fund



2015 ANNUAL REPORT

LET YOUR LEGACY **EMPOWER** LIVES
IN CHESTER COUNTY AND BEYOND

Chester County
COMMUNITY FOUNDATION



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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 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**.





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**.

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

Karen A. Simmons
President/CEO

Photo courtesy of The Land Conservancy
for Southern Chester County



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 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.



*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
- ARC of Chester County
- Archmere Academy
- Art Partners Studio
- Association for the Colonial Theatre
- Atlantic Salmon Federation
- Atonement Lutheran Church
- Austerlitz Historical Society
- Balanced Innovative Teaching Strategies
- Bank Street College of Education
- Barclay Friends

- 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
- Brigham and Women’s Hospital
- Bringing Hope Home
- Bryn Mawr Presbyterian Church
- Calistoga Boys & Girls Club
- Calvary Lutheran Church
- Camp Dreamcatcher

- Camphill 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 Art 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
- Chestnut Hill Business Improvement District
- Children’s Country Week Association
- 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



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 Foundation
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
Gleason 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
KenCrest Services
Kendal-Crosslands Communities
Kennett After-School Association-After the Bell
Kennett Area Community Services
Kennett Area Park Authority
Kennett Area Senior Center
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

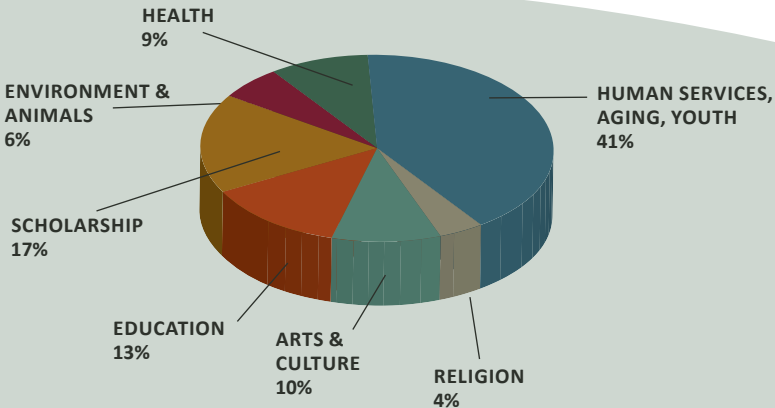
Kimberton Waldorf School
King's Academy
Kolbe Fund
Kutztown University
Kutztown University Foundation
La Comunidad Hispana
Lighthouse Youth Center
Living Breath Foundation
London Grove Friends Meeting
Lord's Pantry of Downingtown
Lyme Disease Association of SE PA
Make-A-Wish Foundation of Philadelphia
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
Parkesburg Library
Partners in Outreach

Peacemaker Center
Peirce College
Pennsylvania Home of the Sparrow
Pennsylvania Parks and Forests Foundation
People For People, Inc.
People's Pantry at Church Road
Peter's Place
Petra Community Housing
Philabundance
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
Pope John Paul II Regional Catholic Elementary
Pottsgrove Middle School
Pottsgrove School District

Pottstown Cluster of Religious Communities
Primitive Hall Foundation
Quaker City Farmers
Radnor ABC
Redeem
Rhode Island College
Riddle Health Care Foundation
Rotary Club of Churchville Foundation
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
ServeNow
SILO
Snow Scientific Research Foundation
Southern Chester County Day Care Association
Special Olympics PA-Chester County Program
St. James School
St. Mary's Franciscan Shelter
Stroud Water Research Center
Sunshine Foundation
Support Center for Child Advocates

Tasis 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
Triskeles Foundation
UCLA Foundation
Underground Railroad Project
Unite for HER/Pink Invitational
United Way of Chester County
United Way of Southern Chester County
University of Pennsylvania
Upland Country Day School
Uptown Entertainment Alliance
Valor Bowl c/o Believe & Achieve Foundation
Villanova University
Volunteer English Program
Washington Gorge 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 Escherick Museum
WHYY
William Alanson White Institute
Williamson Free School of Mechanical Trades
Willistown Conservation Trust
Willistown Friends Meeting-Educational Fund of the Trustees
Willistown Okehocking 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



**CCCF GRANTS & SCHOLARSHIPS
DISTRIBUTED = \$2,000,097
7/1-6/30**

LEGACY PHILANTHROPY AWARDS

DOOR OPENER AWARD

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

KURT KUNSCH 2015 WINNER

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	2011	Duke Schneider, Esq.
2005	L. Peter Temple, Esq.	2012	Robb S. Frees, CIC
2006	Michael B. Karwic, CFP, CRPC	2013	Richard Clark, CPA, CFP®, ChFC®
2007	David M. Frees, III, Esq.	2013	Stephen Olsen, Esq.
2008	John A. Featherman, III, Esq.	2013	Timothy Knauer, Esq.
2009	Honorable Dr. Clifford DeBaptiste	2014	Louis N. Teti, Esq.
2010	William J. Gallagher, Esq.	2015	Kurt Kunsch

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 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.





DR. HENRY A. AND BARBARA M. JORDAN AWARD

significant, longstanding, comprehensive philanthropic achievements

ALICE K. & RODMAN W. MOORHEAD III

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**
- **provide access to healthcare and promote healthier lifestyles for all people**

- **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, AgriDyne 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 minister... **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.**



FUNDS



The Community Foundation currently is entrusted with **350** funds.

The **24** newest funds are in **colored print**.

The average fund size is **\$135,000**.

Noted after each fund is its inception date.

CCCF FUNDS

CCCF Adler Legacy Fund Honoring Eva L. Verplanck, Ph.D., 2006

CCCF American Cancer Society Endowment Fund, 1998

CCCF Annuity Fund, 2002

CCCF Arts Forever Fund, 2005

CCCF Benjamin Franklin Trust, 1995

CCCF Board of Trustees Institute, 2013

CCCF Brandywine Conservancy Lincoln Building Monitoring Fund, 1999

CCCF Delno C. Large & Dennis C. Large Memorial Foundation, 2005

CCCF Diane & Thomas Lafferty Fund-Benefit Wistar Institute, 1999

CCCF Fund For Coatesville, 2000

CCCF Grantmaking Fund for ChesCo Honoring Richard I.G. Jones, 2007

CCCF Grantmaking Fund for Chester County, 1998

CCCF Grantmaking Fund for Chester County Environment, 2001

CCCF HARB Gettysburg Address Contest, 2004

CCCF Jordan Award Fund, 1998

CCCF Josiah Hibberd Award Honoring Margeretta Durnall Hibberd, 2013

CCCF Lincoln Biography Building Endowed Fund, 1996

CCCF Madalene Hayes Conner Scholarship Foundation, 2003

CCCF NP C4 Capacity Building Fund, 2010

CCCF NP Peer Learning Circles for Board Members, 2015

CCCF NP Peer Learning Circles for Development Managers, 2014

CCCF NP Peer Learning Circles for Emerging Directors, 2015

CCCF NP Peer Learning Circles for Executive Directors, 2014

CCCF NP Peer Learning Circles for Planned Gift Managers, 2014

CCCF Operating Endowment, 2001

CCCF Operating Endowment at Susquehanna, 2012

CCCF Operating Endowment Honoring Frances Richards Pyle, 2012

CCCF Operating Fund, 1994

CCCF Summer Fundraising Fund-June Jubilee, 2013

CCCF Sweet Charity, 2013

CCCF West Chester Optimist Scholarship Fund, 2011

CCCF West Chester Trust & Relief Endowed Fund, 2000

CCCF William & Anne Evans Jr. Grantmaking Fund, 2013

CCCF William & Anne Evans Jr. Operating Legacy Fund, 2013

CCCF Youth Philanthropy Program at Great Valley High School, 2005

CCCF Youth Philanthropy Program at Westtown School, 2007

CCCF Youth Philanthropy Program Initiatives, 2005

CCCF YWCA Chester County Scholarship Fund, 2010

ChesCo Community Imprints Fundraising Fund, 2013

ChesCo Community Imprints Giving Circle, 2009

ChesCo Community Imprints Grantmaking Endowment Fund, 2009

ChesCo Community Imprints Operating Fund, 2009

DONOR ADVISED FUNDS

Anonymous (2)

1002 Fund, 1999

4Kids2C Charitable Fund, 2010

Aaron & Jean Martin Fund, 1994

Amy Elizabeth Drobish Foundation, 2010

Anne & Gus Teipelke Charitable Legacy Fund, 2013



Anne Stroud Hannum Charitable Fund, 1998

Barney Harahan Memorial Foundation, 2002

Barrie Stavis Foundation, 2002

Baxter Family Foundation, 2014

Baylus & Deborah Francis Charitable Fund, 2002

Beccaria Charitable Fund, 2006

Believe, Play & Have Fun Foundation, 2015

Bradley Hughes Foundation, 2009

Bugel Family Foundation, 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

Champlain Social Ministry Foundation, 1999

Chase Your Dream Foundation, 2007

ChesCo Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007

Clay-Mir Charitable Foundation, 2011

Connor T. Schmidt Foundation, 2001

Daley Family Foundation, 2015

Daryl E. & Martha J. Thomas Foundation, 2002

DeBaptiste Foundation, 2010

Di & Dallas Krapf Foundation, 1999



Dianne & Dave Elderkin Charitable Fund, 2013

Dick & Jane Kunsch Family Foundation, 2014

Diederich Family Foundation, 2007

Doe Run Charitable Fund, 2005

Don Gregory Stout Memorial Outreach Endowed Fund, 2014

Edward H. & Dorothy K. Dickol Foundation, 2006

Elizabeth Bove Foundation, 2013

Emily's Dash Foundation, 2012

Everett Frank Legacy Foundation, 2000

Farnesi Family Foundation, 2000

Featherman Family Foundation, 2006

Francis J. Snyder Foundation, 2007

Frees Family Foundation, 1998

Ginger English Memorial Foundation, 2007

Good Fight Foundation, 2005

Goodnow Foundation, 2005

Happy Romar Fund of Chester County, 2000

Harry & Aggie Tyler Can-Do Foundation, 1999

Heart in Hand Partnership Endowed Fund, 2000

Heather Lynn Drobish Foundation, 2010

Helen & Paul Breitegam Charitable Fund, 2003

Helen & Robert Whittaker Memorial Trailhead Park Foundation, 2011

Hennigan Family Foundation, 2007

Hockman Family Foundation, 2012

Hollenbach Family Foundation, 2000

Honorable Dr. Clifford DeBaptiste Church Foundation, 2014

Hutton Family HeLP Fund, 2000

I Scream for Elephants Charitable Fund, 2011

Ilex Charitable 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

Jim Decker Compassion Ministry Charitable Fund, 2002

Joan & William Walkup Family Foundation, 1999

John Eirkson & Kathy Ryan Esq. Charitable Fund, 2009

John H. Phillips III Memorial Fund For Horseshoe Scout Res, 2000

Jordan Family Fund for Chester County, 1998

K & M Foundation, 2003

K9s4kids Charitable Fund, 2010

Kathleen McBratnie Memorial Foundation, 2004

Kelly Family Foundation, 2012

Kenneth W. & Joanne H. Tunnell Charitable Fund, 1998

Kevin Holleran Charitable Fund, 1999

Koester Family Foundation, 2000

Krapf Family Foundation, 1999

L.E.G. Up Charitable Foundation, 2007

Lacy Charitable Fund, 2014

Laudenslager Family Foundation, 2011

Laura Lee Hervey Endowed Fund for Traumatic Brain Injury, 2007

Laura Meikle Koch Memorial Legacy Foundation, 2008

Liddick Family Foundation, 2007

Lockwood Family Foundation, 2007

Loew Family Foundation, 2007

M & M Foundation, 2001

Manor Avenue Charitable Fund, 2014

Margaret S. DeVinney Foundation, 2011

Marjorie L. & Arthur P. Miller, Jr. Charitable Fund, 1998

Marvin & Shirley Porter Educational Foundation, 2009

Mesothelioma and Asbestos Disease Society Charitable Fund, 2004

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

Newlin Foundation, 2010

Newlin Scholars Foundation, 2010

Next Step Charitable Fund, 2014

Nick Smiles on the Fine Arts Foundation, 2010

Niles-Milner Fund for Student Travel, 2004



Orchard Charitable Fund, 2001
P.G. Thomas Charitable Legacy Foundation, 2009
Patricia C. & John Celii, Jr. Foundation, 2007

Pay It Forward Fund, 2014

PFF Charitable Fund, 2000
Pink House Foundation, 1998
Put Your Money Where Your Mouth Is Foundation, 2009
Quigley Family Foundation, 2012
RE/MAX Main Line Charitable Foundation, 2006

Reading Family Foundation, 2014

Rev. William J. Fischler Memorial Cursillo Foundation, 2007
Richard & Carolyn Vermeil Foundation, 2010
Richard & Lois Hodgson Charitable Fund, 1998
Rigg Family Foundation, 2011

RJ Hogga Foundation, 2014

Robert & Jennifer McNeil Charitable Fund, 2002
Robert M. Price Memorial Foundation, 2004
Robert Olin Niles Memorial Foundation, 2010
Robert Wiley Miller Memorial Foundation, 2000
Romig Road Victory Run Foundation, 2008
Ruch Family Foundation, 2011
Samantha Lee Zajac Memorial Foundation, 2001

Sarnacki Family Foundation, 2014

Schwartz Family Foundation, 2001
Shobaken Family Foundation, 1998
Spurlino Family Foundation, 2006
St. Ann Rose Charitable Fund, 2000
Stanley's Dream Charitable Endowment Fund, 2007
Stephen Chandler Ericson Memorial Foundation, 2011
Sunday Foundation, 2012
Susan Groome Harney Memorial Foundation, 2000
T&G Charitable Fund, 2005
Teresa V. Garofalo VMD Memorial Scholarship Fund, 2011
Terry Muzzy Scholarship Foundation, 2007
Teti Family Foundation, 2006

Tom & Betty Hess Charitable Fund, 2014

Trajabay Charitable Fund, 2005
Tres Foundation, 2003
Tyler Family Foundation, 2005
Valerie Lamb Smith Art Foundation, 1998
Vaughan Family Foundation, 2000
Woody's Woods Memorial Foundation, 2003
Zelinda LeBoutillier Charitable Foundation, 2011

FIELD OF INTEREST FUNDS

Adolescent Awareness Foundation, 2012
Coatesville Community Health Foundation, 1999
Friends of Chester County Seniors Fund, 2010
International Equine Conf on Laminitis & Diseases of Foot, 2008
Neil Joines Fund, 2013
PA Foundations Online Outreach Charitable Fund, 2010
Parkesburg Environmental Foundation, 1998

PCHF Community Health Leadership Academy Fund, 2014 **PCHF Executive Leadership Institute Fund, 2014**

Samuel Barber Charitable Fund, 1998
Spot Castle Foundation, 2003
West Chester Walk of Fame Foundation, 2013

Whitford Charitable Endowed Grantmaking Fund, 2014

Whitford Charitable Fund, 2011

FISCAL AGENT-INTERIM FUNDS

Decade to Doorways Charitable Fund, 2013
Friends of Hershey Mill Dam Charitable Fund, 2011
Land and Water Resources e-Institute Charitable Fund, 2007
Oxford Arts & Culture Center Charitable Fund, 2011



NONPROFIT ENDOWMENT FUNDS

ACT in Faith Charitable Fund, 2012
ARC of Chester County Endowment Fund, 2000
Bishop Shanahan High School Endowment Fund, 2002
Bournelyf Special Camp Endowment Fund, 2005
Brandywine Valley Association Endowment Fund, 2005
Camphill Special School Endowment Fund, 2005
Canine Partners For Life Endowment Fund, 1999
CCEPC-Chester County Estate Planning Council Fund, 2005
Chester County Art Association Endowment Fund, 1999
Chester County Council Boy Scouts of America Endowment Fund, 2013
Chester County Fund for Women and Girls Grants Endowment, 2001
Chester County Fund for Women and Girls Operating Endowment, 2001
Chester County Fund for Women and Girls SRI Endowment, 2004
Chester County Futures Endowment Fund, 1999
Chester County Historical Society Endowment Fund, 2007
Chester County Library Endowment Fund, 1999
Chester County S.P.C.A. Endowment Fund, 2005

The Clinic Endowment Fund, 2007

Coatesville Community Education Foundation Endowment, 2009
Community Coalition Quasi-Endowed Fund, 1999
Community Gardens of Chester County Endowment Fund, 2000
CVIM Edgar R. Lawrence, DDS Dental Endowment Fund, 1999
CVIM Gordon B. Hattersley, Jr. Endowment Fund, 1999
Daemion Counseling Center Endowment Fund, 2004
Devereux Foundation Endowment Fund, 2008
Domestic Violence Center of Chester County Endowment Fund, 2007
Easttown Library Foundation Endowment Fund, 2011
Family Service of Chester County Endowment Fund, 2008
French & Pickering Creeks Conservation Trust Endowed Fund, 2013
Friends of Anson B. Nixon Park Endowment Fund, 1999
Good Works Endowment Fund, 2002
Great Valley Nature Center Endowment Fund, 2002
Greater West Chester Rotary Foundation, 2013
Green Valleys Watershed Association Endowment Fund, 2014
Habitat for Humanity of Chester County Endowment Fund, 2002
The Hickman Endowment Fund, 2004

Home & Farm Antique Association Restricted Endowment Fund, 2000

Home and Farm Antique Association Unrestricted Endowment Fund, 2000

Interfaith Housing Assistance Corporation of Chester County Endowment Fund, 2014

Jenner's Pond Resident Charitable Endowment Fund, 20001
John Rock Memorial Foundation, 2004
Kennett Area Senior Center Endowment Fund, 2013
Kennett Symphony of Chester County Endowment Fund, 2006
Kerr Memorial Park Endowment Fund, 2010
Kiwanis Club of Phoenixville Endowment Fund, 2001
La Comunidad Hispana Honorary Endowed Fund, 2013

The Land Conservancy for Southern Chester County Endowment Fund, 2014

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

Lions Club of Kennett Square Endowment Fund, 2001
Longwood Rotary Club Scott Thompson Education Award, 2008
Lundale Farm Endowment Fund, 2013
Margaret E. Coppedge Memorial Fund to Benefit Grimes AME Church, 2005
Maternal & Child Health Consortium Endowment Fund, 1998
United Way of Southern Chester County Endowment Fund, 2004



Mayor Clifford E. DeBaptiste Educational Endowment for WCU, 1998

Mill at Anselma Preservation and Educational Trust Foundation, 2003

Parkesburg Free Library Endowment Fund, 1996

Paul Hassenplug Educational Fund of the Rotary, 1999

Pennsylvania Home of the Sparrow Endowment Fund, 2006

Phoenixville Community Education Foundation Endowment Fund, 2006

Phoenixville Public Library Foundation Endowment Fund, 1999

Planned Parenthood of SE PA Endowment Fund, 1995

Primitive Hall Endowment Fund, 1996

Priority One Foundation Endowment Fund, 2004

Quest Therapeutic Services Endowment Fund, 2011

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

Spackman-Holleran Endowment Fund for UW Chester County, 1998

Stroud Water Research Endowment Fund, 1997

Thorncroft Endowment Fund, 2010

Thorndale Rotary Jay Edge Community Service Award, 2009

United Way of Southern Chester County Endowment Fund, 2004

Volunteer English Program Endowment Fund, 2015

W. Marshal Schmidt Endowed Fund for Childrens' Country Week, 1998

Walden School Endowment Fund, 2001

West Chester Downtown Foundation Grantmaking Endowment, 2014

West Chester Downtown Foundation Operating Endowment Fund, 2004

West Chester Downtown Foundation Up On the Roof Fundraiser, 2013

West Chester Friends School Endowment Fund, 2006

West Chester University Library Endowment Fund, 1998

West Goshen Lions Club Endowment Fund, 1998

Wharton Esherick Studio Preservation Endowed Fund, 2001

Wharton Esherick Studio Site Maintenance Endowment Fund, 2011

Wharton Esherick Studio Woodworking Award Endowment Fund, 2012

William S. West Memorial Fund for Petra Community Housing, 2000

Willistown Conservation Trust Endowment Fund, 2013

Woman's Club of Downingtown Endowment Fund, 2003

YMCA of Greater Brandywine Endowment Fund, 1999



SCHOLARSHIP FUNDS

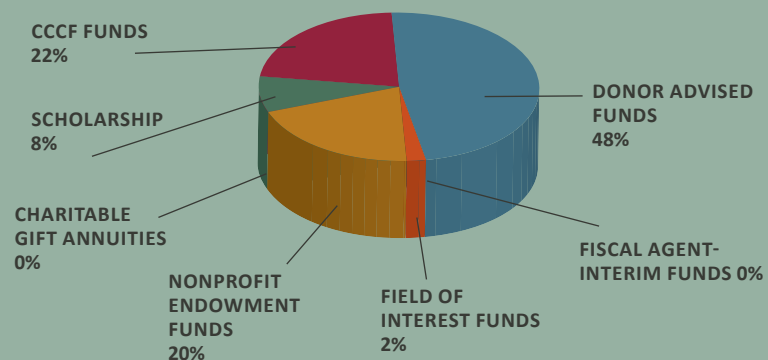
- Alice Lawson Scholarship Fund, 1998
- Alice M. Thomas Scholarship Fund, 1998
- Brianne Carter Memorial Scholarship Foundation, 1999
- Carl O. Benner Scholarship Foundation, 2001
- Carl Schnellenbach Wrestling Scholarship Fund, 2001
- Caroline Gallagher Cranston Memorial Scholarship Fund, 2011
- CCEPC Marc P. Riddell Memorial Scholarship Fund, 2010
- Charles A. Melton Scholarship Fund, 1999
- Charles R. White Scholarship Fund, 1999
- Coach Millard Robinson Memorial Foundation, 2001
- Constance & Michael Briglia Memorial Foundation, 2006
- Dana Marie Carr Memorial Scholarship Fund, 2000
- Dr. Alan G. Elko Legacy Scholarship Fund, 2008
- Dr. Gerald E. Clark Memorial Scholarship Foundation, 2008
- Dr. John H. Hewlett, III Scholarship Fund, 1999
- Dr. Robert & Doris Hanna Scholarship Fund, 2003
- 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 Fund Scholarship, 2005
- George W. Martyn, Jr. Scholarship Fund, 2000
- Halliday Clark, Sr. Memorial Scholarship Fund, 1998
- Harry Dunn Art Scholarship Fund, 2001
- Hon. Dr. Elinor & William Taylor Scholarship Fund, 2004
- Jeffrey A. Wheet 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
- Karrlin Field Memorial Scholarship Fund, 2005
- Kelly Ann Foundation, 2013
- Kennett Education Foundation Angel Scholarship Fund, 2009
- Laura Meikle Koch Drexel University Scholarship Foundation, 2008
- 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, 2005
- 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
- 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

CCCF FAMILY OF FUNDS % OF ASSETS

To create your legacy fund, contact Donor Services at (610) 696-8045 or info@chescofc.org. The minimum contribution to establish an endowed fund is \$25,000

- Average endowed fund size = \$135,215
- Average donor advised fund size = \$163,667
- Average nonprofit endowment 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

- | | | |
|---------------------------------------------------------------|---------------------------------------------------------------------------|--------------------------------|
| Louis J. Beccaria, Ph.D. | Matthew 25 Fund | Anonymous of Media |
| Henry S. Belber, II* | Mr. & Mrs. Raymond M. Moskowicz | Anonymous of Mendenhall |
| Elsie Bodnar* | Plymouth Charitable Fund | Anonymous of New York City, NY |
| Elizabeth Bove* | Robert & Karen Rigg | Anonymous of Paoli (3) |
| Michael Jay and Elizabeth Harper Briglia | Cecilia C. Schramm* | Anonymous of Parkesburg |
| Robert & Lucille Bugel | Leslie B. Schramm* | Anonymous of Phoenixville (4) |
| Constance Carter | Karen A. Simmons | Anonymous of Princeton, NJ |
| Patricia C. & John Celii, Jr. | Barbara Sunday | Anonymous of Spring City |
| Kimberly C. Collier* | Gustave & Anne Teipelke | Anonymous of West Chester (21) |
| Margaret S. DeVinney* | Craig Lincoln Tucker | Anonymous of West Grove (2) |
| Eugene DiOrio | Christopher Lockwood Vaughan | Anonymous of Wilmington |
| William & Anne Evans, Jr.* | Anonymous Estate (4)* | Anonymous of Wynnewood |
| John & Wiggie Featherman | Anonymous Estate Bequest to benefit Kennett High School Scholarship Fund* | |
| Ronald Fletcher | Anonymous of Bryn Mawr | |
| Deborah Francis | Anonymous of Chester Springs (3) | |
| Harold Freeman | Anonymous of Cheyney (2) | |
| David & Robin Frees | Anonymous of Coatesville (4) | |
| Frances T. Herron* | Anonymous of Devon | |
| Josiah H. Hibberd* | Anonymous of Downingtown (3) | |
| Richard J. Hutton* | Anonymous of Exton | |
| Richard A. Kunsch, Sr. | Anonymous of Glenmoore | |
| Carl & Sylvia Landis | Anonymous of Hilton Head, SC | |
| Ida Mae Large* | Anonymous of Jennersville (3) | |
| Zelinda LeBoutillier* | Anonymous of Kennett Square (6) | |
| Jack Loew* | Anonymous of Kimberton (2) | |
| Bronwyn L. Martin, Ph.D., MBA, CFS, CRPC, CMFC, ChFC, AEP (2) | Anonymous of Malvern | |



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

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.

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.



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.

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 **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--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
\$135,000 = average fund size
Any gift amount can be added to existing funds.

FUND HIGHLIGHTS

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?*

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. Edyie 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 Edyie, "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 bountiful 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 squeezed 25 hours out of each 24 hour day."

- Edyie Joines

From 1974 to 1979, Neil worked for Hooper & O'Neill Real Estate and its successor firm, Focus Realty/Bob O'Neill Real Estate in Kennett Square. He earned membership in the Million Dollar Sales Club.

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. Errig 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.



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 mother Marie died in 2005. His friend William relinquished his life estate in 2007, in an outstanding act of generosity. With each transition, the Joines Fund charitable trust grew.

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.

Grantee photos: Summer Concerts in Nixon Park via grant to Kennett Area Park Authority, Kennett Library, Kennett After the Bell, Kennett Symphony. Neil Joines photos courtesy of Edyie 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."

"Working with the Community Foundation is easy," notes Jeff Darman. "For our first year, Community Foundation staff compiled a list of nonprofits that fit Neil's description, and rated them according to Neil's criteria."

Adds Paul Redman, "The Community Foundation's groundwork enabled our committee to focus on current Kennett arts and culture issues in a more nuanced fashion. We refined the final grant award allocations and amounts. It's become an enjoyable and efficient process."

Per Mike Elling, "Now the Joines Fund incurs a much smaller fee for administration. The Joines Fund doesn't pay to file a separate IRS-990 tax form, and it pays less for overall investment management and grant administration. More money goes to the causes that Neil cared about."

The newest member, Scudder Stevens Esq., notes, "I am looking forward to this next round of grantmaking. The Community Foundation has a track record of adding value to the grantmaking as well as the investment side."

Neil Joines lived a complex life filled with vigor and variety. Yet he made his philanthropic desires exceptionally clear. The Community Foundation is honored to be entrusted with Neil Joines' legacy, tending to the causes Neil passionately cultivated, now and forever.



THE WHITFORD CHARITABLE FUND

Est. 2011

An Affinity for Sport | A Community of Friends

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 Teti 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

- Sunday: Whitford Charitable Golf Pro-Am, featuring the Best Professionals in the Philadelphia Section of the PGA . Cocktails and Awards following the Tournament.

The September Whitford Charitable Fund Classic is preceded by 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.**”

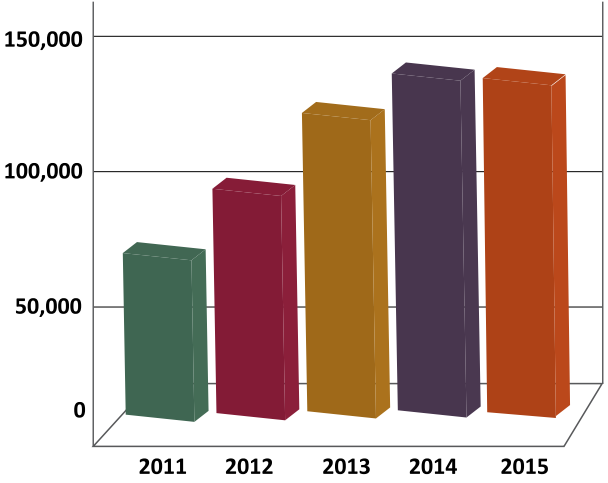
Adds Jim, “We didn’t have the desire nor the time to secure our own 501(c)(3) status. And no one was real thrilled about doing the banking, keeping the bookkeeping accounts, or generating contribution receipts. When Lou Teti Esq., a Whitford Charitable Fund Committee member, introduced us to the Community 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.

In its first year, the Whitford Charitable Fund granted \$65,000 to eight grantees. As of Fall 2015, over \$510,000 has been granted to 23 nonprofit charities.

Whitford’s members play a crucial role in deciding the charitable beneficiaries: **after all, they raise the money.** As the popularity of the event has grown, so have the grant monies and the number of grant applications. Whitford Charitable Fund has a Grants Committee which reviews all proposals, after disclosing interests and relationships they have with local nonprofits.

WHITFORD CHARITABLE GRANTS NONPROFIT GRANTS TOTALING \$500,000+ 2011-2015



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. 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.”



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>



Whitford photos courtesy of David James Photography.



Whitford Charitable Fund grantees since inception include:

- Aidan’s Heart Foundation
- Camphill 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

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Contributions totaled \$3,665,185 from 2,553 donors.

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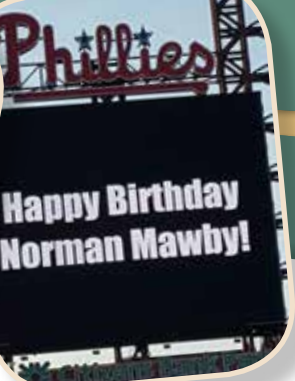
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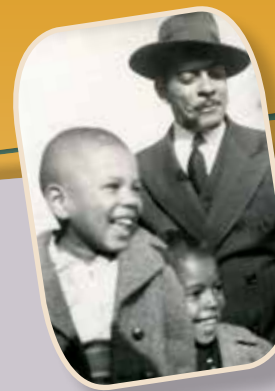
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correct errors or omissions.
Contact the Foundation at
(610) 696-8211 or info@
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your understanding and
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Manito Abstract Company
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The Merz Group
Pegasus Technologies
Precision Realty Group
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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

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THANKS TO OUR 30+ SWEET VOLUNTEERS

Victoria Gardens Auxiliary
West Chester University Abbe Society
West Chester University Friar Society
*+ all our former Community Foundation
interns who return to lend a hand*



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 (defined below).
2. to minimize portfolio drawdown risk, to the extent possible, in seeking to achieve the Foundation’s long-term growth objectives.

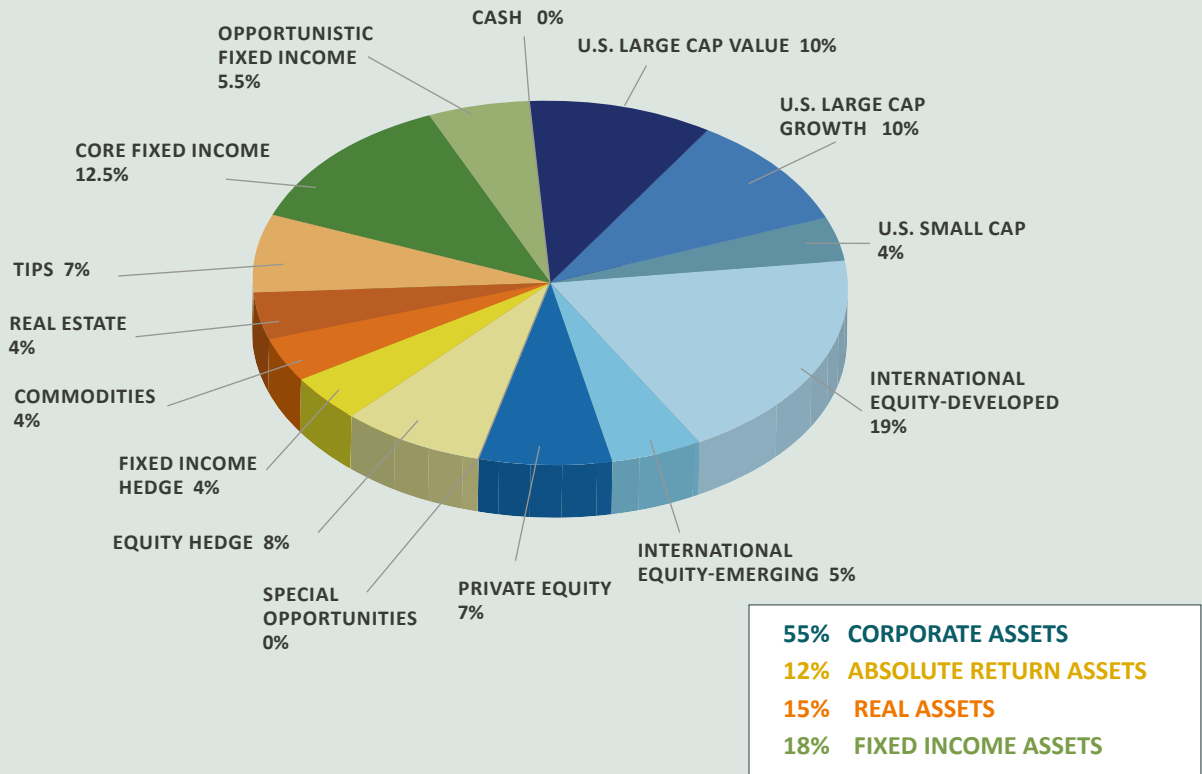
Endowed Funds Long Term Target Return: The Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation’s administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year end balance). 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

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 CCCCF Aggregated Endowed Funds



Total Consolidated Annualized Returns for the Endowed Portfolio as of 6/30/2015



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



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

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.





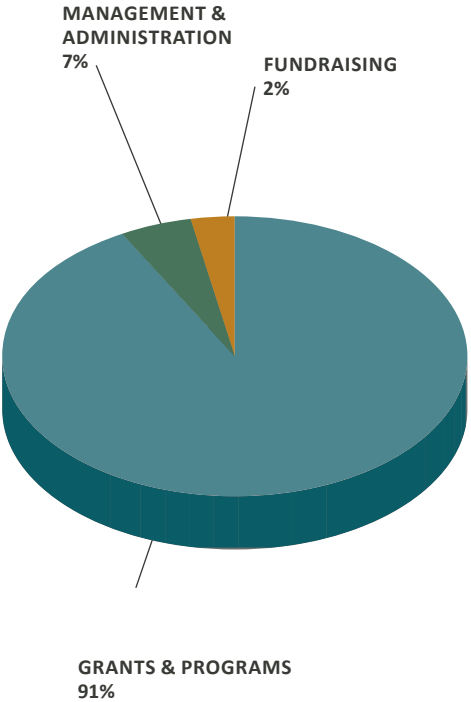
FINANCES

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

ASSETS	AUDITED 2015	2014 RESTATED
Cash & cash equivalents	\$2,877,150	\$4,089,990
Unconditional promises to give, net	55,208	112,498
Prepaid expenses	14,903	11,625
Loan receivable	-	250,000
Certificates of deposit	930,278	967,209
Marketable securities	44,187,618	41,632,021
Property & equipment, net	443,437	489,480
TOTAL ASSETS	\$48,508,594	\$47,552,823
LIABILITIES		
Accounts payable & accrued expenses	\$70,893	\$102,663
Annuities payable	349,186	276,305
Not-for-profit endowments	4,944,165	4,730,318
TOTAL LIABILITIES	\$5,364,244	\$5,109,286
NET ASSETS		
Unrestricted-board designated	\$43,089,142	\$42,331,039
Temporarily restricted	55,208	112,498
TOTAL NET ASSETS	\$43,144,350	\$42,443,537
TOTAL LIABILITIES AND NET ASSETS	\$48,508,594	\$47,552,823

To obtain a copy of the audit or IRS 990, contact the Foundation.
(610) 696-8211 or info@chescofc.org

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



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