

Connecting people who care with causes that matter, so their philanthropy makes a difference

Now & Forever



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GROWING BEYOND YEARS 2019 ANNUAL REPORT









GROW



CELEBRATE











TABLE OF CONTENTS

Chair/CEO Welcome1	
Timeline2	
Inspire4	
Celebrate	
Grow14	
Funds	
Legacy Society22	
Door Opener Award24	
Donors & Sponsors26	
Investments	
Finances	
Grantees	
Board & Staff	



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Standards for U.S. Community Foundations

Connecting people who care with causes that matter, so their philanthropy makes a difference

Now & Forever

25TH ANNIVERSARY VIDEO CHATS WITH FOUNDING & EMERITUS BOARD MEMBERS





Our 25th anniversary is a milestone so large that our **celebration lasts all year.** This report showcases our initiatives to **INSPIRE & CELEBRATE & GROW** legacy philanthropy throughout 2019.

We **INSPIRE** philanthropy by getting the word out in a myriad of ways. In this report, you'll see how we capitalize on video, social media, print media, forums, trainings and gatherings.

We **CELEBRATE** philanthropy each day, but especially at Sweet Charity and our 25th Anniversary reception. Thanks to our hosts and guests, these silver events shined brightly this year.

During our anniversary year, we continue to GROW. The Community Foundation:

- proudly awarded \$3.2 million in grants and scholarships (3/4 million more than last year)
- welcomed 32 new funds, bringing the total number of funds to 394
- received 2,000 contributions totaling \$8.3M. Individual generosity grew, as monetary donations increased 45% compared to last year.

During our first quarter century we awarded \$43 million to the community via 10,300 grants and scholarships.

Through the years, we have seen that philanthropy grows due to the inspiration and action of:

- individuals, families & friends
- community neighbors, civic groups, nonprofit causes, business groups & more.

Our cover collage includes some of our **new faces of philanthropy**—people who created new funds during our 25th anniversary year. Please join us. We are eager to support the vibrant initiatives of the next wave of people who want to make a significant positive difference, now and *forever*.

Ounhoughon

Anthony Morris, Esq. Chair of the Board

2018-2020

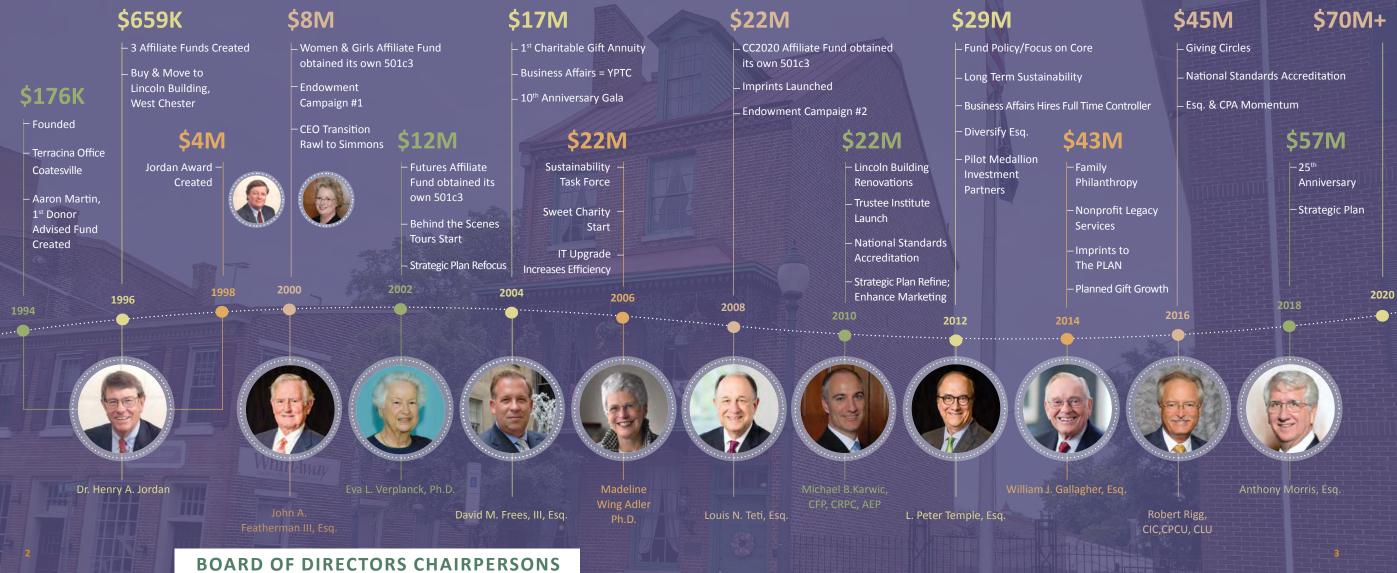
Karen A. Simmons President/CEO



Timeline & Milestones

1994 (pictured left) Founders photo taken at the Lukens home office in Coatesville. Mercer W. Jones, Michael Rawl, Dr. Henry A. Jordan, Elizabeth Ranney Moran, RW Van Sant, Lee Foote, Louis J. Beccaria Ph.D., Carol Ware Ph.D., John A. Featherman III Esq., James P. Dunigan. 2004 (pictured right) 10th Anniversary Founders photo taken at Brushwood Stable Gala in Malvern. John A. Featherman III Esq., Louis J. Beccaria Ph.D., Carol Ware Ph.D., Charles Lukens Huston III, Elizabeth Ranney Moran, Dr. Henry A. Jordan.



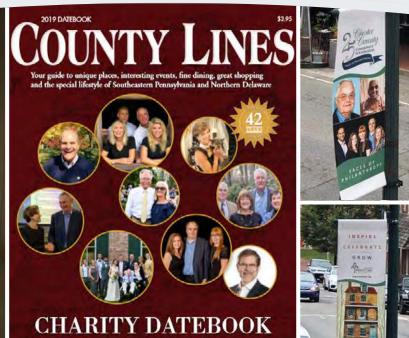


We inspired philanthropy throughout our 25th Anniversary year by featuring our Profiles in Philanthropy. We are grateful to our Fund Advisors who agreed to be in the spotlight daily.

Profiles in Philanthropy

- Annual meeting, annual report, website
- 25 lamppost banners for display all year
- Posters for partners to display all year
- Extensive social media posts on Facebook, Instagram, LinkedIn, Twitter & YouTube
- Keyword contextual targeting online
- Guest editor of *County Lines Magazine* Faces of Philanthropy Issue
- Tailor Made Media video interviews
- Radio & newspaper interviews and articles





Faces of Philanthropy







Our Inspirational TED Talks Feature

Provocative philanthropy topics High-quality, brief video presentations Opinionated, experienced regional panelists Thoughtful attendees Very good food & wine

+ Exceptional host sites

INSPIRED PHILANTHROPY



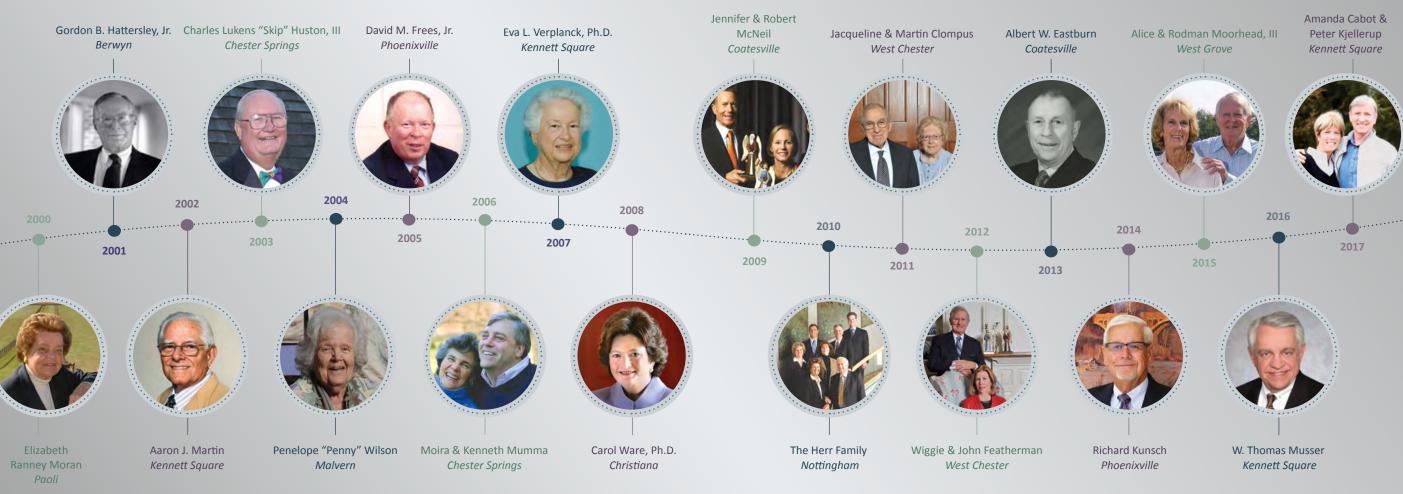




Jordan Award Honorees

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.





25th Anniversary Celebration

SPRING SILVER SWEET CHARITY AT WHITFORD COUNTRY CLUB



BEST DESSERT PROFESSIONAL JUDGES VOTE

General Warren Inn

Vegan Chocolate Raspberry



Mizuna Catering

Fried Banana Spring Rolls



BEST DESSERT POPULAR VOTE

John Serock Catering Arancini Dolci



25th Anniversary Celebration

SUMMER SILVER RECEPTION AT SHADY GROVE, HOSTED BY FRANNY & FRANNY ABBOTT

- New Street Heat Jazz Trio
- John Serock Catering
- Wine Tasting By Michael Horak Featuring Galer, Patone & Stargazers
- East Branch Brewing Craft Beer Tasting
- Celebratory 25th Anniversary Cupcake Creation By Cheryl's Sweet Delights
- West Chester Mayor's Champagne Toast To Honor Our Past * Present * Future



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.

The Community Foundation primarily holds endowed funds in

• Endowed Funds are allowed up to a 5% grant payout

for perpetuity, to assure that grant funds are always

• 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.

lifetime—and in perpetuity—through your gift. You will have the

satisfaction of seeing the impact of your generosity as you carry

The Community Foundation can help you articulate your wishes

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

for gifts commencing after your lifetime. The Community

us know so that we can properly carry out your wishes.

Foundation accepts most planned giving vehicles, including

Your charitable interests can be supported during your

trust. We also manage some provisional funds.

available to help nonprofits.

LIFETIME GIFTS

out your charitable objectives.

FUTURE GIFTS

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

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

Scholarship Funds

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

Memorial Funds

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

WAYS TO GIVE

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

- Focus your gift with a contribution to a Field of Interest Fund (arts/culture, health, human services, religion, education, environment)
- 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
- 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, CPA, CAP®, Executive Vice President (610) 696-8045 Meetings are confidential.

\$25,000 = minimum to create endowed fund \$162,000 = average fund size Any gift amount can be added to existing funds.





Funds

The Community Foundation is entrusted with 394 funds.

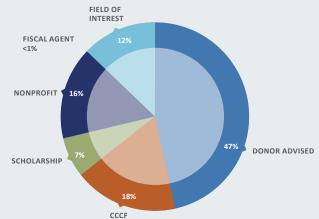
- The **32** newest funds are in colored print
- Average fund size is \$162,000
- Minimum contribution to establish an endowed fund is \$25,000
- Inception year is noted after each fund name

CCCF FUNDS

CCCF 25th Anniversary Fund, 2018 CCCF Adler Legacy Fund Honoring Eva L. Verplanck, Ph.D., 2006 CCCF American Cancer Society Endowment Fund, 1998 CCCF Annuity Fund, 2002 CCCF Benjamin Franklin Trust, 1995 CCCF BizOnBoard Program Design, 2016 CCCF Board of Trustees Institute, 2013 CCCF Delno C. Large & Dennis C. Large Memorial Foundation, 2005 CCCF Diane & Thomas Lafferty Fund to Benefit Wistar Institute, 1999 CCCF Fund for Coatesville, 2000 CCCF Giving Circle Grantmaking Funds, 2016 CCCF Grantmaking Fund for ChesCo Environment, 2001 CCCF Grantmaking Fund for ChesCo Honoring Richard I.G. Jones, 2007 CCCF Grantmaking Fund for ChesCo, 1998 CCCF HARB Gettysburg Address Contest, 2004 CCCF Hutton Grantmaking Fund for Chester County, 2017 CCCF Nancy Petersen Grantmaking Fund for Chester County, 2019 CCCF Jordan Award Fund, 2001

CCCF Josiah Hibberd Award Honoring Margeretta Durnall Hibberd, 2013 CCCF Lincoln Biography Building Endowed Fund, 1996 CCCF Lincoln Building Monitoring Fund, 1999 CCCF Madalene Hayes Conner Scholarship Foundation, 2003 CCCF NP C4 Capacity Building Fund, 2010 CCCF NP Peer Learning Circles for Development Managers, 2014 CCCF NP Peer Learning Circles for Executive Directors, 2014 CCCF NP Peer Learning Circles for Planned Gift Managers, 2014 CCCF Operating Endowment Honoring Frances Richards Pyle, 2012 CCCF Operating Endowment, 2001, 2012 CCCF Operating Fund, 1994 CCCF Parkesburg Environmental Foundation, 1998 CCCF Summer Fundraiser Fund, 2013 CCCF Sweet Charity, 2013 CCCF West Chester Optimist Scholarship Fund, 2011 CCCF William & Anne Evans Jr. Operating Legacy Fund, 2013 CCCF YWCA Chester County Scholarship Fund, 2010

CCCF FAMILY OF AFFILIATED FUNDS BY % OF ASSETS, FY2019



DONOR ADVISED FUNDS Anonymous (2) 1849 Charitable Fund, 2018

The 323 Charitable Fund, 2017 4Kids2C Charitable Fund, 2010 Aaron & Jean Martin Fund, 1994 Amy & Patrick Conrad Family Fund, 2010 Ann & Steven Hutton Fund, 2017 Anne & Gus Teipelke Charitable Legacy Fund, 2013 Anne Stroud 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

Bianca Nikol Merge with Mercy Foundation, 2019

Bogle Family Charitable Fund, 2018 Bradley Hughes Foundation, 2009 Brian C. Zwaan Legacy Fund, 2017 Bugel Family Foundation, 1998 Capacity for Change Fund, 2008 Carl & Sylvia Landis Foundation, 2012 Carol Spaner Rahill Foundation, 2018 Caroline Manning Bolton Legacy Fund, 2002

Champlain Social Ministry Foundation, 1999

Charles W. Dickinson Charitable Foundation, 2019 Chase Your Dream Foundation, 2007 ChesCo Fund for Teacher Support, in Memory of Taylor Patterson Crane, 2007 Clay-Mir Charitable Foundation, 2000 Connor T. Schmidt Foundation, 2001 Craig Lincoln Tucker Memorial Fund, 2019

Daley Family Foundation, 2015 Daryl E. & Martha J. Thomas Foundation, 2002

David Kenosian Charitable Fund, 2017

David L. & Janet L. Hughes Family Charitable Foundation, 2019 DeBaptiste Foundation, 2010

DeHaven Family Charitable Fund, 2017 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 Donna & Thomas Urian Charitable Fund, 2017 Dr. Henry & Blanche Sineath Charitable Fund, 2017 Dr. Timothy V. Blair Charitable Legacy Foundation, 2018

Dr. Timothy V. Blair Charitable Legacy Foundation, 2018

Edward H. & Dorothy K. Dickol Foundation, 2006 Elizabeth Bove Foundation, 2013 Emily's Dash Foundation, 2012 Eric Miller Memorial Charitable Fund, 2016 Everett Frank Legacy Foundation, 2000 Farnesi Family Foundation, 2000 Featherman Family Foundation, 2006 First Resource Bank's Millennial Professionals' Fund, 2018 Francine's Organic Kids Charitable Fund, 2018 Francis J. Snyder Foundation, 2007 Frees Family Foundation, 1998 Ginger English Memorial Foundation, 2007 Good Fight Foundation, 2005 Hadley Fund, 2016 Hailey Bear Memorial Fund, 2016 Happy Romar Fund of Chester County, 2000

Harold & Carol Wingerd Charitable Fund, 2018 Harry & Aggie Tyler Can-Do Foundation, 1999 Heart in Hand Partnership Endowed Fund, 2000 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 Hutton Family HeLP Fund, 2000 Ilex Charitable Fund, 2012 J. M. & Lois B. Herr Family Foundation, 1998 J. M. Blair Charitable Trust Foundation, 2018 Jack C. Griest Charitable Fund, 2013

Jamison Family Fund, 2018

Jeff Elko Memorial Fund, 2018 Jeffrey Robert Drobish Foundation, 2010

Jerrery 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 & Heather Drobish Family Fund, 2010 John Eirkson & Kathy Ryan Esq. Charitable Fund, 2009 John H. Phillips III Memorial Fund for Horseshoe Scout Reservation, 2000 Jordan Family Fund for Chester County, 1998 K&M Foundation, 2003 K9s4kids Charitable Fund, 2010 Kathleen McBratnie Memorial Foundation, 2004

GROW

Kathrvn J. & Larrv C. Smedlev Charitable Fund. 2018

Kelly Family Foundation, 2012 Kennedy Marie Canzoneri Memorial Fund, 2016 Kevin & Priscilla Holleran Charitable Fund, 1999 Kim L. Ringler & Thomas A. Wurm Family Foundation, 2017 Koester Family Foundation, 2000 Krapf Family Foundation, 1999 Kricun Charitable Fund, 2018

L. William "Bill" Kay II Charitable Fund, 2018 L.E.G. Up Charitable Foundation, 2007 Lacy Charitable Fund, 2014 Lamberth Family Foundation, 2016 Laudenslager Family Foundation, 2011 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 E. Coppedge Memorial Fund to Benefit Grimes AME Church, 2005 Margaret S. DeVinney Foundation, 2011 Marjorie L. & Arthur P. Miller, Jr. Charitable Fund, 1998 Marvin & Shirley Porter Educational Foundation, 2009 Mary T. Holleran Charitable Fund, 2018

Masters Legacy Fund, 2017 Matthew 18:20 Fund, 2012 McGowan Family Charitable Fund, 2016 Mesothelioma and Asbestos Disease Society Charitable Fund, 2004 Michael & Nancy Pia Foundation, 2019 Moretzsohn Family Foundation, 2000

Mr. & Mrs. Robert P. Moran, Jr. Family Foundation, 2010 Nancy & Ulrich Klabunde Charitable Fund, 2019 Nannette & Dale Krapf Foundation, 1999 Newlin Foundation, 2010 Next Step Charitable Fund, 2014 Nick Smiles on the Fine Arts Foundation, 2010 Niggeman Family Foundation, 2004 Niles-Milner Fund for Student Travel, 2004

Noel & Robert Stanek Foundation, 2018

Orchard Charitable Fund, 2001 Patricia C. & John Celii, Jr. Foundation, 2007 Pav 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 Roberson/Rowley Foundation Honoring Bianca & Mykel, 2017 Robert & Jennifer McNeil Charitable Fund, 2002 Robert M. Price Memorial Foundation, 2004 Robert Olin Niles Memorial Foundation, 2010 Robert W. & Janet C. Johnson Family Foundation, 2018 Robert Wiley Miller Memorial Foundation, 2000 Ruch Family Foundation, 2011 Samantha Lee Zajac Memorial Foundation, 2001

Sandra C. Brown Charitable Foundation, 2018 Sarnacki Family Foundation. 2014 Schwartz Family Foundation, 2001 Shobaken Family Foundation, 1998 Smart Family Fund, 2017 Spurlino Family Foundation, 2006 St. Ann Rose Charitable Fund, 2000 Stamm Consultancy Charitable Fund. 2016 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 The Lark Fund, 2012

Thomas A. Fillippo Foundation, 2019

Tick Tock Early Learning Center-Capital Campaign Gift Fund, 2016 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 William S. Latoff Charitable Foundation. 2016 William T. & Dorothy B. Simpers Charitable Fund, 2018 Zelinda LeBoutillier Charitable Foundation, 2011

FIELD OF INTEREST FUNDS

Adolescent Awareness Foundation, 2012 Chester County Charitable Fund (The Color Run Fund), 2017 Coatesville Community Health Foundation, 1999 Friends of Chester County Seniors Fund, 2010 Giving Circle-ChesCo Bar Young Lawyers Division, 2017 Giving Circle-Friends of Eliza, 2017 Giving Circle-Friends of Steve Norcini, 2018 Imprints Grantmaking Endowment Fund, 2009 International Equine Conference on Laminitis & Diseases of Foot, 2008 Long Term Recovery Committee of Chester County

Charitable Fund. 2018 Martha B. Wollerton Charitable Fund, 2018

Neil Joines Fund, 2013

PCHF Community Health Leadership Academy Fund, 2014 PCHF Community Needs Assessment Fund, 2016 PCHF Executive Leadership Institute Fund, 2014 Richard C. Mahan & Margaret A. Murray Charitable Fund, 2017 Spot Castle Foundation, 2003 Thoroughbred Education & Research Foundation, 2018 Tim Merriman Memorial Charitable Fund, 2016 Wentworth Association Fund for Senior Housing, 2018 Wentworth Association Fund for West Chester Area Senior Center. 2018

West Chester Adapted Fitness & Wellness Fund, 2016 Whitford Charitable Endowed Grantmaking Fund, 2014 Whitford Charitable Fund. 2011

FISCAL AGENT-INTERIM FUNDS

Chester County Estate Planning Council Fund, 2005 Decade to Doorways Charitable Fund, 2013 Friends of Marshall Square Park Fund, 2018

NONPROFIT ENDOWMENT FUNDS

ARC of Chester County Endowment Fund. 2000 Association for the Colonial Theater Endowment Fund, 2016 Bishop Shanahan High School Endowment Fund, 2002 Bournelyf Special Camp Endowment Fund, 2005 Brandywine Red Clay Alliance Endowment Fund, 2005 Camphill Special School Endowment Fund, 2005 Canine Partners for Life Endowment Fund, 1999 Charles A. Melton Arts & Education Center Endowed Fund. 2018 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 Futures Endowment Fund, 1999 Chester County Library Endowment Fund, 1999 Chester County S.P.C.A. Endowment Fund, 2005 Citizen Advocacy of Chester County Endowment Fund, 2016 The Clinic Endowment Fund, 2007 Coatesville Community Education Foundation Endowment. 2009 Community Coalition Quasi-Endowed Fund, 1999 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 Domestic Violence Center of Chester County

PCHF P.I.E. Program Endowment Fund, 2017 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

Good Works Quasi-Endowed Fund, 2019

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 Endowment Fund, 2000 Jenner's Pond Resident Charitable Endowment Fund, 2001 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 Maternal & Child Health Consortium Endowment Fund, 1998 Mayor Clifford E. DeBaptiste Educational Endowment for WCU, 1998

Mill at Anselma Preservation and Educational Trust Foundation. 2003 North Star of Chester County Endowment Fund, 2014 Oxford Educational Foundation Endowment Fund BB&T, 2017 Oxford Educational Foundation Endowment Fund, 2017



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 Safe Harbor of Chester County Endowment Fund, 2016 Stroud Water Research Endowment Fund, 1997 Thorncroft Endowment Fund, 2010 Thorndale Rotary Jay Edge Community Service Award, 2009 United Way of Chester County Endowment Fund, 1998 United Way of Southern Chester County Endowment Fund, 2004 Volunteer English Program Endowment Fund, 2015 W. Marshall Schmidt Endowed Fund for Childrens' Country Week, 1998 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 Westminster Presbyterian Church Endowment Fund, 2017 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 Kennett Area Educational Assistance Stipend Fund, 2017 YMCA of Greater Brandywine Endowment Fund, 1999

SCHOLARSHIP FUNDS

Alice Lawson Scholarship Fund, 1998 Alice M. Thomas Scholarship Fund, 1998 Brian Kadunc Memorial Scholarship Fund, 2016 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 Debbie Coppedge Mitchell Memorial Scholarship Fund, 2018 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 East End Neighborhood Association Scholarship Fund, 2009 Eleanor & James Latta, Jr. Scholarship Fund, 2013 Elizabeth G. Dorsett Memorial Scholarship Fund, 2001 Emily & George Purnell Scholarship Fund, 2017

Eugene J. & Mary DiFilippo Scholarship Fund, 1999 Front Porch Trust Fund Scholarship, 2005 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, 200 Manor Avenue Scholarship Fund, 2014 Maria Whitehead Memorial Scholarship Fund, 2010 Mullestein Family Scholarship Fund, 2018 Natalie A.W. Leaf Charitable Fund. 2001 Newlin Scholars Foundation, 2010 Nicholas R. MacElree Scholarship Fund, 2005 Patricia Alleva DeHaven Scholarship Fund, 2017 Patricia B. Dixon Scholarship Fund, 2009 Peoples First Scholarship Fund, 2004 Quaker City Farmers Scholarship Fund, 2001 Rotary Club of Coatesville Educational Fund, 1998 Ruch Family Scholarship Fund, 2011 Schramm Scholarship Fund, 2005 Scott Elliott Memorial Scholarship Fund, 2019 Stanley's Dream Scholarship Fund, 2010 Stephan P. Hagelauer Memorial Scholarship Fund, 2019

Stephen P. Calabro Memorial Scholarship Fund, 2018 Susan DeCecco Scholarship Fund, 1999

Sweet Jane's Wish Foundation, 2012 W. Thomas Musser Memorial Charitable Fund, 2017 West Chester Henderson Class of 1953 Scholarship Fund, 2008 West Chester Vietnam Memorial Scholarship Fund, 2016 Westtown Goshen Rotary Richard Hodgson Education Foundation, 1999

"When I do good, I feel good ."

- ABRAHAM LINCOLN

Sweet Jane's Wish FOUNDATION MINING Beyond Breast Cancer Two Thousand Five Hundred DOLLARS \$2,500 Sweet Gave 's Wish Poundation



Ben Franklin Legacy Society

Harold Freeman

Robin & David Frees

Michael R. Gould*

Frances T. Herron*

Please join our 155 Legacy Society Members. Simply name 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.

Make your intentions public, inspire others, and help 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

Thomas B. Andress* Sue M. Barber* Louis J. Beccaria, Ph.D. Henry S. Belber, II* Cynthia Dawn Ericson & Gary Beideman Dr. Timothy Vance Blair Elsie E. Bodnar* Robert & Jean Boell Caroline M. Bolton* Elizabeth T. Bove* Beth Harper Briglia, CPA, CAP & Michael Briglia, MBA, CFP® Lucille^{*} & Robert H. Bugel Constance L. Carter, CFRE Patricia C. & John* Celii, Jr. Kimberly C. Collier* Priscilla & Robert Crowder

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Sandra L. McNair & Barry R. McHale Meghan McVety & Jason Alexander Marjorie & Arthur Miller Dr. Frank E. Milliman* Mary Ann & Raymond Moskowicz Matthew 25 Fund Nancy Lynn Petersen* Joseph N. Pew g. & Plymouth Charitable Fund

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*cum stellarum











Door Opener Award

Spotlighting stellar professional advisors who bring legacy philanthropy to the attention of their clients and colleagues



Patrick C. O'Donnell, Esq. Gawthrop Greenwood 17 E Gay St, West Chester, PA 19380



Nancy Petersen

www.gawthrop.com • podonnell@gawthrop.com

The Community Foundation is pleased to spotlight Patrick C. O'Donnell, Esq. as this year's Door Opener, as a result of estate planning work undertaken with Nancy Petersen.

Pat's good friend and client Nancy Lynn Petersen left her mark on each community where she lived, actively embodying the true spirit of informed, compassionate, civic engagement.

Born near Pittsburgh, PA, Nancy graduated from Muskingum College in Concord, OH in 1961. Upon moving to Philadelphia, Nancy was an integral figure in the South Street renaissance in the 1960s and '70s due to her involvement with the Theatre of the Living Arts. She helped establish Philadelphia's first Earth Day. For the country's 200th anniversary, Nancy helped organize the Bicentennial Wagon Train that crossed the United States in 1976.

As a reporter for the Philadelphia Inquirer, Nancy covered politics, social justice, community development, and the environment within Chester County for over two decades. One of her editors, Jim Asher, recalled, "Nancy was known for her encyclopedic knowledge of Chester County's political players, plus her tenacity and grace." Another editor said, "Nancy was modest and cheerful, smartly subversive, generous to colleagues, and totally plugged into the community she covered."

Nancy loved vacationing on the Eastern Shore of Virginia. In 2011 she "retired" to Onanock, VA and continued to be active in her community. An avid bird watcher, Nancy joined the Eastern Shore Bird Club and obtained her certification as a Master Naturalist. She helped with the Eastern Shore's marshlands, served as a board member for the Friends of the Accomack Library, and led discussions and served on the board for The Academy for Lifetime Learning. For the Accomack County Democratic Party, Nancy served as Secretary and also Treasurer.

Before she left Chester County in 2011, Nancy had made arrangements in her will to leave a portion of her estate to the **Chester County Community Foundation.** Upon Nancy's passing in 2017, her estate attorney and close friend Patrick C. O'Donnell Esq. recommended that Nancy's estate gift be earmarked to the Grantmaking In addition to having served as a Board Fund for Chester County, so that the **Community Foundation can make grants** to honor Nancy's civic engagement and environmental concerns for perpetuity.

Known far and wide for his longstanding civic engagement, Pat is of counsel at Gawthrop Greenwood, PC. He focuses on municipal, land use and estate issues. Pat represents municipalities, zoning hearing boards, developers, financiers, homeowners, estates, families and elder clients. With 40+ years of experience, Pat's wisdom is so highly valued that the Chester County Bar Association deemed him qualified to serve as a judge. Pat has served twice as a Chester County Commissioner, elected in 1979 and appointed in 2007.

Patrick graduated from King's College with his B.A. in 1970. In 1975 he earned his J.D. from Dickinson School of Law where he graduated Manga Cum Laude after working as a field examiner for the PA Department of Revenue.

member of the Chester County Bar Association and the Chester County Community Foundation, Pat has served as a Board member and volunteer for scores of Chester County nonprofits. This includes Chester County Historical Society, Family Services of Chester County, Good Fellowship Ambulance Club, Planned Parenthood of Chester County and West **Chester Friends School.**

Pat and his wife, Hannah Gardener, Esq., reside in West Chester and Bermuda. We are privileged that they continue to vibrantly serve our community.

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Oxford Educational Foundation Endowment @ Vanguard **Oxford Educational Foundation**

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PCHF Community Health Leadership Academy Fund **Phoenixville Community Health Foundation**

Phoenixville Kiwanis Fund Phoenixville Federal Bank & Trust Village Optical Virk Learning Center

PJ's Scholarship Fund Mr. Alonzo L. Brown

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Whitford Charitable Foundation

West Goshen Lions Club

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YMCA of Greater Brandywine Charitable Fund Ms. Kathleen Goin, in honor of the wonderful Dave Aloisio. We will miss you. YMCA Kennett Area Educational Assistance Stipend Fund Put Your Money Where Your Mouth Is Fund Aaron & Jean Martin Fund

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



Investment Management

PORTFOLIO OBJECTIVES

The Community 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 Community 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 Community 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.

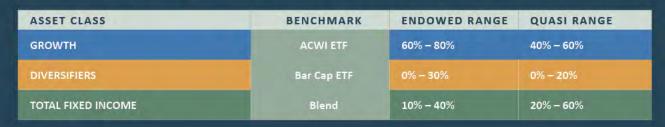
Endowed Funds Long-Term Target Return:

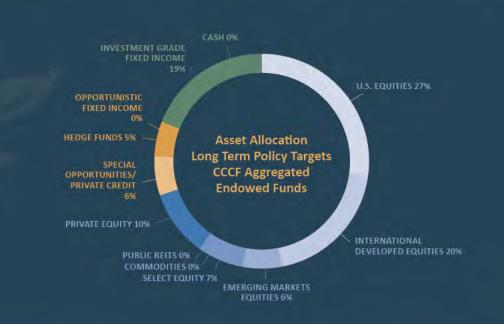
The Community Foundation desires a long term target return that provides portfolio growth, exceeds inflation, covers investment fee expenses, covers the Foundation's administrative fee, and covers the annual grant payout (of up to 5% of the previous fiscal year end balance). Based on the fluctuating 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 Community Foundation desires a long term target return that provides portfolio growth, covers investment fee expenses, covers the Community Foundation's administrative fee, and partially covers a potential annual grant payout (of up to 20% of the previous fiscal year end balance).

Policy Portfolio Structure and Ranges







Total Consolidated Annualized Returns for the Endowed HC Portfolio as of 6/30/2019

CHIEF INVESTMENT OFFICER FIRM — AGGREGATE INVESTED ASSETS

HIRTLE, CALLAGHAN & CO.

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 Community 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 an endowed 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:

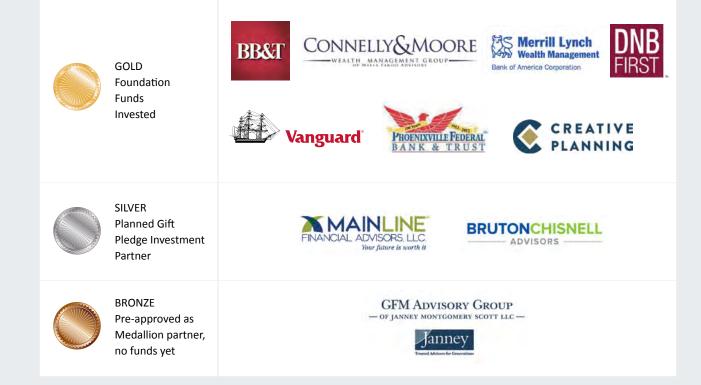
- donors supply the charitable passion
- wealth managers and investment advisors supply the investment expertise
- the Community Foundation supplies the charitable legacy vehicle

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 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:



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
- the Community Foundation understands legacy philanthropy

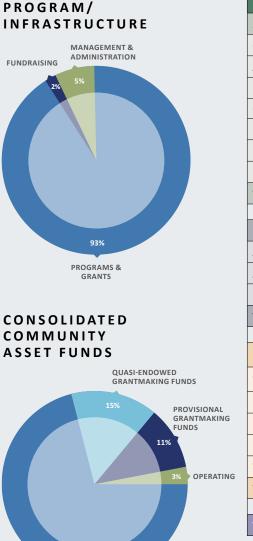
It's a winning partnership. The Community Foundation helps advisors and their clients customize philanthropy solutions for their specific situations. Whether it is through a gift of appreciated securities or real estate, a non-cash asset, a life insurance policy, or bequest, there are many ways the Community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



Finances

CHESTER COUNTY COMMUNITY FOUNDATION STATEMENT OF FINANCIAL POSITION *as of June 30*





· · · · · · · · · · · · · · · · · · ·	
ENDOWED	
RANTMAKING	
FUNDS	

	Audited 2019	Audited 2018
ASSETS		
Cash	\$ 2,420,182	\$ 2,398,652
Accounts receivable	22,066	34,013
Prepaid expenses	27,053	24,715
Certificates of deposit	1,399,303	1,251,348
Investments	60,600,336	53,660,251
Note receivable	0	250,000
Property & equipment, net	322,288	351,897
TOTAL ASSETS	\$ 64,791,228	\$ 57,970,876
LIABILITIES		
Accounts payable & accrued expenses	\$ 410,209	\$ 147,148
Annuity obligations	200,039	203,353
Nonprofit endowments	5,810,864	5,454,131
TOTAL LIABILITIES	\$ 6,421,112	\$ 5,804,632
NET ASSETS		
Without donor restrictions		
Operating	\$ 1,797,391	\$ 1,682,769
Board designated	56,558,559	50,449,462
	\$ 58,355,950	\$ 52,132,231
With donor restrictions	\$ 14,166	\$ 34,013
TOTAL NET ASSETS	\$ 58,370,116	\$ 52,166,244
TOTAL LIABILITIES & NET ASSETS	\$ 64,791,228	\$ 57,970,876

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

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.

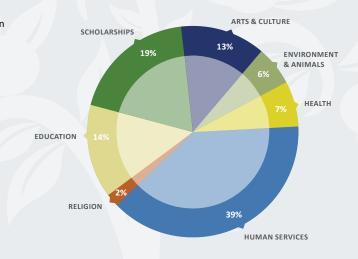
Our donors establish grantmaking funds at the Community Foundation. The majority of grant decisions are made by the families and individuals whose funds the Community Foundation holds in trust.

GRANTEES 4 Paws For Ability Act in Faith of Greater West Chester Aidan's Heart Foundation Alzheimer's Association -**DelVal Chapter** American Association for Cancer Research American Cancer Society -East Central Division American Friends Service Committee American Heart Association American Legion Auxiliary American Philosophical Society Amigos de Jesus Amnion Animal House Project Appalachian State University ARC of Chester County Archmere Academy Association for the **Colonial Theatre** Atlantic Salmon Federation Avon Grove Community Theater Avon Grove Library **Baker Industries** Baldwin School BalletX **Barclay Friends** Barn at Spring Brook Farm Barnstone Arts for Kids **Belmont Child Care Association Bethany Christian Services** Bianca Nikol Merge With Mercy Foundation **Birmingham Southern College Bishop Shanahan High School** Bloomsburg University Blue White Scholarship Foundation Borough of Phoenixville **Bournelyf Special Camp** Boy Scouts of America, Chester County Council

Cradle of Liberty Council Boys and Girls Club of Boston **Brandywine Baptist Church** Brandywine Conservancy **Brandywine Health Foundation** Brandywine Red Clay Alliance **Brandywine Valley Chorale Brandywine Valley** Hemophilia Foundation **Brandywine Valley SPCA** Bryn Mawr College Bryn Mawr Rehabilitation Hospital **Bucknell University** Cabrini University Cairn University California University of PA **Camp Dreamcatcher Campbell University Camphill Special School** Canine Partners for Life Carnegie Mellon University **Carter Community** Development Corp. Casa Guanajuato **Cecil College Foundation** Centennial Lutheran Church Charles A. Melton Art & Education Center Chester County 2020 Chester County Art Association **Chester County Christian Chorale** Chester County Dept of **Community Development Chester County Food Bank Chester County Fund for** Women and Girls **Chester County Futures Chester County Hospital** Foundation Chester County Library **Chester County Suicide Prevention** Task Force **Chester County Women's Services** Children's Country Week Association

Boy Scouts of America,

CCCF GRANTS & SCHOLARSHIPS DISTRIBUTED 7/1-6/30



Children's Hospital of Philadelphia Foundation Citizens Advocacy of **Chester County** City Gate Coatesville Area Senior Center **Coatesville Community Education** Foundation Coatesville Kids to College Coatesville Youth Initiative College of the Atlantic **Community Coalition Community Volunteers** in Medicine **Community Warehouse Project** of Chester County Concordia Choral Arts **Cornell University** Council on Foundations County Corrections Gospel Mission County of Chester Cradles to Crayons

Crime Victims' Center of Chester County **Cystic Fibrosis Foundation Daemion Counseling Center Daniel Foundation** Delaware County **Community College** DelVal Children's Charity Domestic Abuse Project of Delaware County Domestic Violence Center of Chester County Downingtown Borough Downingtown Library Drexel University Duke University Duquesne University Earlham College Eastern University Easttown Library & Information Center **Educated Canines Assisting** with Disabilities



Elizabethtown College

Emory University Equine Advocates Fair Hill Thoroughbred Show Fairview Evangelical Presbyterian Church Faith in the Future Foundation Family Promise of S. Chester County Fordham University Forgotten Cats Foundation at Great Valley Foundation For Free Enterprise Education Foundation for Lee County Public Schools Frankie's World Foundation Fred Hutchinson Cancer Research Center Fred's Footsteps Friends Association for Care & Protection of Children Friends Home in Kennett Square Friends of Marshall Square Park Friends of Taconic State Park Friends of the Medal of Honor Grove Future Leaders Today Garage Community & Youth Center of Kennett Square Garage Community & Youth Center of West Grove Georgetown University Georgia Institute of Technology Gettysburg College Girl Scouts of Eastern Pennsylvania Given Memorial Library Global Aid Network Good Fellowship Ambulance Good Neighbors Home Repair Good Samaritan Shelter Good Works Grayson-Jockey Club **Research Foundation** Great Valley Community Organization Great Valley Community Partnership for Healthy Youth Grimes A.M.E. Church

Habitat for Humanity of Chester County Haiti Partners Hampton University Handi-Crafters **High Point University** Historic Kennett Square Honevbrook Food Pantry La Comunidad Hispana Hood College La Mancha Animal Rescue Hope Community Church Lancaster Bible College Hope Partnership for Education Lancaster General Health Horse-Shoe Trail Conservancy Foundation Immaculata University Lantern Theater Company Independence Mission Schools LaSalle University Indiana University Bloomington Lasata Farm Indiana University Lebanon Valley College of Pennsylvania Let's Get Ready International House New York LGBT Equality Alliance Ivy Hill Foundation Liberty University J. Wood Platt Caddie Lifeline Family Center Lighthouse Youth Center Scholarship Trust James Madison University Lincoln University Living Beyond Breast Cancer Jenner's Pond Jesuit Center at Wernersville Living Breath Foundation Jonathan Moules London Grove Friends Meeting Steps4Hope Foundation Lord's Pantry of Downingtown Junior League of Philadelphia Loyola University of Maryland Justice Rescue Lupus Research Alliance Juvenile Diabetes Lutheran Services in America **Research Foundation** Lycoming College Kean University Lyme Disease Association **Keiser University** of SE PA **Kendal-Crosslands Communities** Magee Rehabilitation Hospital Foundation Kennett After-School Association–After the Bell Main Line Animal Rescue Kennett Area Maloto **Community Services** Mann Center for the Kennett Area Park Authority Performing Arts Kennett Area Senior Center Marine Corps Law Kennett Fire Company #1 **Enforcement Foundation** Kennett Flash Marine Corps League Kennett Library Martin Luther King Community Kennett Symphony of Greater Kennett of Chester County Maryland Horse Kennett Underground Industry Foundation Railroad Center Marywood University **Keystone College** Massachusetts College of Art Kiwanis Club of Phoenixville & Design Kutztown University **Masters School** Kutztown University Foundation

During FY2019, \$3.2 million in grants and scholarships was awarded. 575 grants totaling \$2.7 million. 225 scholarships totaling \$515,000.

> Maternal & Child Health Consortium Media Mennonite Church Mill at Anselma Preservation Educational Trust Millersville University Misericordia University Monmouth University Montclair State University Moore College of Art & Design Mount Aviat Academy Mount Desert Island Search & Rescue Mushroom Festival Musicopia Napa Valley College Foundation Natural Lands Natural Resources Council of Maine New Found Freedom Foundation New Life Community Church New York City Relief New York University New York Yacht Club Foundation Norchester Red Knights Youth Football North Carolina State University North Star of Chester County Northwestern University Nottingham County Park Ohio State University Open Land Conservancy **Orion Communities** Otho Davis Scholarship Foundation Oxford Area Neighborhood Services Center Oxford Church of the Nazarene **Oxford Educational Foundation Oxford Senior Center** Oxford SILO Serving Inspiring & Loving Others

PA State Police Camp Cadet of Chester County Pancreatic Cancer Action Network Paoli Memorial Hospital Foundation Paoli Presbyterian Church Parkesburg Library Parkesburg Point Partners in Outreach Penn College of Technology Penn State Berks Penn State Brandywine Penn State Cooperative Extension Penn State Dance Marathon Penn State Harrisburg Penn State World Campus Pennsylvania Association of County Fairs Pennsylvania Home of the Sparrow Pennsylvania State University **People For People** People's Light & Theatre Company People's Pantry at Church Road Peregrine Fund Petra Community Housing Philadelphia Chamber Music Society Philadelphia Orchestra Association Philadelphia Ronald McDonald House Phoenixville Area Children's Learning Center Phoenixville Area **Community Services** Phoenixville Babe Ruth League **Phoenixville Community Education Foundation Phoenixville Community** Health Foundation Phoenixville Jaycee Foundation Phoenixville Women's Outreach -The House Planned Parenthood Federation of America Planned Parenthood of SEPA Police Athletic League of Phila. Pottstown Cluster of **Religious Communities**

Primitive Hall Foundation Project Libertad **Pro-Vision Purdue University** Quaker City Farmers **R.J.** Leonard Foundation Redeem **Refugees Thrive International** Retired Racehorse Project **Rice University Riddle Health Care Foundation** Rider University Rochester Institute of Technology Rowan University Foundation **RTC of Culture Trust Rutgers University** S. ChesCo Day Care Association S. ChesCo Regional Police Department S. Connecticut State University Safe Harbor Saint Ann's Church Saint Joseph's University Salesianum High School Salvation Army of Gr. West Chester San Jose State Spartan Foundation Savannah College of Art and Design Save the Children Science Club for Girls SE Veterans' Center Resident Welfare Fund ServeNow Shake It Off Shippensburg University of PA **Snow Foundation** Special Leisure Services Foundation St. Agnes Day Room St. Agnes School St. John's University St. Luke Evangelical Lutheran Church St. Luke's Church St. Mary's Franciscan Shelter St. Peter's Episcopal Church St. Thomas The Apostle Catholic Church St. Timothy's School Stroud Water Research Center

SUNY Owsego Surfside Recovery Services Inc Surgicorps International Surrey Services for Seniors Swarthmore College Team CMMD **Temple University** Thaddeus Stevens College of Technology The Clinic The Hickman **Thomas Jefferson University** Thorndale Downingtown Rotary Club Tin Whistles Educational & Research Foundation **Towson University** Transition Dynamics Associates Tredyffrin & Easttown Care **Triskeles Foundation** Union & West End **Cemetery Association** United Way of Gr Phila & SNJ United Way of Southern **Chester County** University of California at Berkeley University of California Los Angeles University of Delaware University of Maryland University of Pennsylvania University of Pennsylvania Veterinarian School University of Pittsburgh University of Richmond University of the Arts University of the Sciences University of Virginia University of Washington Upland Country Day School Uptown Entertainment Alliance Ursinus College Vassar College Villanova University Virginia Tech Voca Center Volunteer English Program Wave Leadership College Wavne Art Center Wentworth Institute

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

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Special Recognition

We acknowledge the dedicated service of these retiring Board & Committee Volunteers:

Jennifer Byrne, CFA, whose insights, experience, and perfectly pitched comments greatly aided investment deliberations for over a decade.

Pamela Leland, Ph.D., who served a 3-year Board term, adding much to the Governance Committee and Grants Committee due diligence

John Diederich, CFA, who served a 6-year Board term and 12 years on the Investment Committee, steering a discerning Investment RFP process and leading in-depth analyticallybased investment discussions.

Richard K. May

Patrick South, CFA, whose thoughtful comments added a wealth of experience to our Board and Investment deliberations for more than a decade.

Michael B. Karwic, CFP, CRPC, AEP, who completed his second 6-year board term. A past Board Chair, Marketing Chair, and Investment Committee member, Michael has served the Community Foundation for 20 of our first 25 years.

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The Community Foundation welcomes Louis J. Beccaria, Ph.D. to our team. An Emeritus Board Member of the Community Foundation & newly retired CEO of the Phoenixville Community Health Foundation, Lou will cultivate and steward relationships as a flex-time Community Engagement Officer.

The Community Foundation gratefully acknowledges our team of interns from **West Chester University**, who help full-time staff with accounting data entry, database updates, on-line research, website updates, social media public relations, special event logistics, and hundreds of administrative tasks.



"It is in your hands to make a better world for all who live in it."

-NELSON MANDELA