

CHIEF INVESTMENT OFFICER FIRM



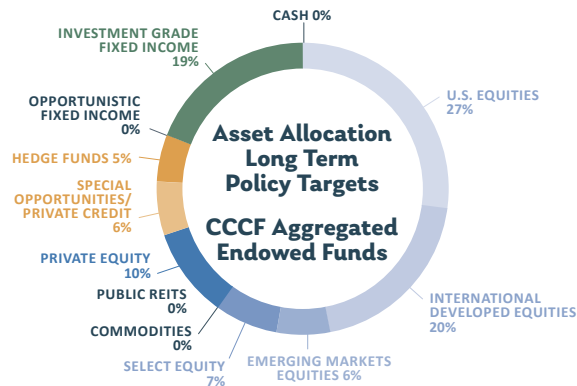
AGGREGATE INVESTED ASSETS

HIRTLE CALLAGHAN works with the Foundation's Investment Committee 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. This includes identifying, selecting and terminating investment managers.

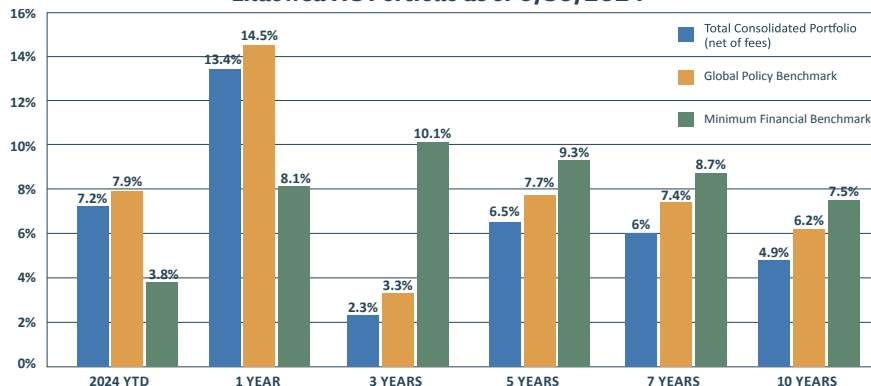
Hirtle Callaghan also retains and directs the activities of the independent custodian, and all other vendors involved in providing data, analysis and other services used to manage the portfolio. Hirtle Callaghan provides quarterly statements and performance reports, net of all fees, with comparisons to relevant benchmarks.

Policy Portfolio Structure and Ranges

| ASSET CLASS | BENCHMARK | ENDOWED RANGE | QUASI RANGE |
|--------------------|---------------|---------------|-------------|
| GROWTH | ACWI ETF/HRFI | 60% - 80% | 40% - 60% |
| DIVERSIFIERS | Bar Cap ETF | 0% - 30% | 0% - 20% |
| TOTAL FIXED INCOME | Blend | 10% - 40% | 20% - 60% |



Total Consolidated Annualized Returns for the Endowed HC Portfolio as of 6/30/2024



MEDALLION PARTNERS

SEPARATELY MANAGED INVESTED ASSETS

The Medallion Investment program gives you the opportunity to establish a donor advised fund at the Foundation, while having a qualified advisor you choose continue to manage the asset and receive investment management fees.

- Medallion status is awarded to investment firms which pass an annual due diligence review undertaken by the Foundation's Investment team.
- Medallion funds are separately managed, non-aggregated funds, which receive their own investment return.
- 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

GOLD Foundation Funds Invested



Planned Gift Pledge Investment Partner



BRONZE Pre-approved as Medallion partner, no funds yet



STATEMENTS OF FINANCIAL POSITION

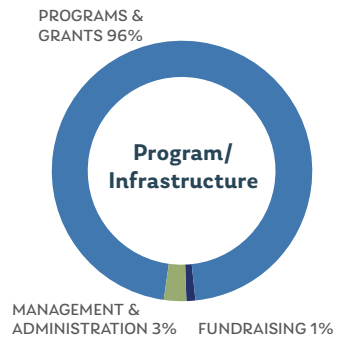
AUDITED BY
withum
ACCOUNTING TAX ADVISORS

AS OF JUNE 30

| | Audited 2024 | Audited 2023 |
|--|-----------------------|-----------------------|
| ASSETS | | |
| Cash and cash equivalents | \$ 4,327,764 | \$ 2,556,784 |
| Contributions receivable | 10,788 | 3,000 |
| Prepaid expenses | 91,345 | 79,445 |
| Certificates of deposit | 1,499,009 | 1,464,439 |
| Investments | 112,287,702 | 98,867,894 |
| Property and equipment, net | 232,470 | 256,759 |
| TOTAL ASSETS | \$ 118,449,078 | \$ 103,228,321 |
| LIABILITIES | | |
| Accounts payable and accrued expenses | \$ 234,100 | \$ 150,505 |
| Grants and scholarships payable | 192,914 | 276,151 |
| Annuity obligations | 151,996 | 149,503 |
| Nonprofit endowments | 7,560,112 | 6,451,252 |
| TOTAL LIABILITIES | \$ 8,139,122 | \$ 7,027,411 |
| NET ASSETS | | |
| Without donor restrictions | | |
| Operating | \$ 1,476,043 | \$ 2,461,645 |
| Board designated | 108,823,125 | 93,736,265 |
| TOTAL NET ASSETS WITHOUT DONOR RESTRICTIONS | \$ 110,299,168 | \$ 96,197,910 |
| With donor restrictions | 10,788 | 3,000 |
| TOTAL NET ASSETS | \$ 110,309,956 | \$ 96,200,910 |
| TOTAL LIABILITIES & NET ASSETS | \$ 118,449,078 | \$ 103,228,321 |

"It is more rewarding to watch money change the world than to watch it accumulate."

— Gloria Steinem



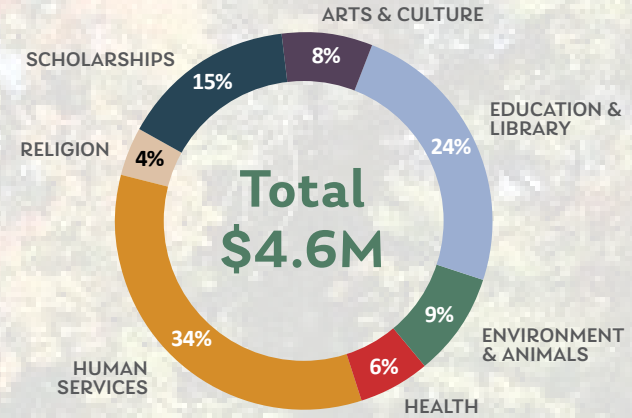
GRANTS & SCHOLARSHIP AWARDS

In FY24, \$4.6 million was awarded

768 grants @ \$3.9 million and 245 scholarships @ \$712,000

Most grant decisions are made by the families and individuals whose funds the Community Foundation holds in trust.

Grants & Scholarships FY24



A Child's Light
A Haven
ACLAMO
Act in Faith of Gr West Chester
Action Against Hunger
Adopt a Boxer
Aegean Conferences
After The Races
AIM at Melanoma
Al-Anon
All 4 Paws Rescue
Alliance for Health Equity
Alzheimer's Association
Delaware Valley Chapter
American Association for Cancer Research
American Cancer Society
American Foundation for Suicide Prevention
American Friends of Lafayette

American Friends Service Committee
American Legion Post 194
Mason Dixon
American Philosophical Society
American Red Cross SEPA
American Society of Dowsters
American Society of Transplantation
Amigos de Jesus
Amplify Horse Racing
Amy's Yard Sale
Andy's Friends
Angels Retreat
Angie's Stray Foundation
Ann's Heart
ARC of Chester County
Archbishop John Carroll High School
Arts Holding Hands & Hearts
Association for the Colonial Theatre
Atlantic Salmon Federation
Avon Grove Education Foundation
Avon Grove Library
Baldwin School
BalletX
Barclay Friends
Barn at Spring Brook Farm
Belmont Child Care Association
Bethesda Project
Better Days Ahead
Bishop Shanahan High School
Blue White Scholarship Foundation
Borough of Parkesburg
Bournelyf Special Camp

Boy Scouts of America ChesCo
Boys & Girls Club
Boys & Girls Clubs of Phila
Brandywine Baptist Church
Brandywine Conservancy & Museum of Art
Brandywine Red Clay Alliance
Brandywine Valley Active Aging
Brandywine Valley Chorale
Breastcancer.org
Bridge Academy & Community Center
Bringing Hope Home
Brookline Labrador Retriever Rescue
Brothers of the Christian Schools
Buck Hill Conservation Foundation
Butterfly Baskets
Calvary Chapel Chester Springs
Camp Dreamcatcher
Camp Papillon Animal Shelter
Camphill School
Canadochly Evangelical & Reformed Church
Canandaigua Lake Watershed Association
Cancer Research Institute
Canine Partners for Life
CARE
Care Center Foundation
Casa Guanajuato
Catholic Foundation of Gr Phila
CeaseFirePA
Cedarbrook Camp PA
Cerebral Palsy Foundation
Champlain Island Food Shelf
Chesapeake Bay Foundation
ChesCo 2020
ChesCo Art Association
ChesCo Dpt Community Development
ChesCo Food Bank

ChesCo Futures
ChesCo History Center
ChesCo Hospital Foundation
ChesCo Library
ChesCo Pops Orchestra
Children's Country Week
Children's Hospital of Phila
Citizen Advocacy ChesCo
City Gate
Coatesville Area NAACP
Coatesville Area Public Library
Coatesville Area School District
Coatesville Youth Initiative
Community Coalition
Community Health & Dental Care
Community Volunteers in Medicine
Community Warehouse Project of ChesCo
CompAnimals Pet Rescue
Concord Carlisle Community Chest
Connect Thru Cancer
Conshohocken Free Library
Cool Cars for Kids
Cooperative Development Services
COTS: Committee on Temporary Shelter
County of Chester
Covenant House PA
Crime Victims' Center of ChesCo
Cross Catholic Outreach

Cru
Cure Alzheimer's Fund
Daemion Counseling Center
Delaware County Community College
Delaware Riverkeeper Network
Delaware Valley Golden Retriever Rescue
Desert Botanical Garden
Dignity in Asylum
Dillard Comp High School Class of 1970
Diversity In Action - Phoenixville
Dog Town Rescue
Domestic Violence Center of ChesCo
Dorothy's Place
Doug Floutie Jr. Foundation for Autism
East Miner Collaborative
Community Development
Easttown Library Foundation
Educational Equity Alliance
Elizabeth Dole Foundation
Emergent Abundance Farming Collective
Fairview Evangelical Presbyterian Church
Family & Community Service of DelCo
Family Promise S. ChesCo
Family Service of ChesCo
Fellowship of Catholic University Students

Fertility Dreams
Finding Shelter Animal Rescue
First Tee Chapter of the Sandhills
First United Methodist Church of Phoenixville
Forgotten Cats
Fort Freedom
Foundation for Lee County Public Schools
Fred's Footsteps
French & Pickering Creeks Conservation Trust
Friends Association for Care & Protection of Children
Friends Home in Kennett Square
Friends of Marshall Square Park
Fund for Women and Girls
Garage Community & Youth Centers
Girl Scouts of E PA
Given Tufts Foundation
Glen Moore Fire Company
Good Fellowship Ambulance & EMS Training Institute
Good Neighbors Home Repair
Good Samaritan Services
Good Works
Grandview Church
Great Valley School District Education Fdtn
Grimes A.M.E. Church
Habitat for Humanity of ChesCo



Habitat for Humanity of
MontCo & DelCo
Handi-Crafters
Harley's Haven Dog Rescue
Haverford College
Health Care Access
Heart of Camden
Hearts Promise Shelter Rescue
Help Hope Live
The Hickman
Hill School
Historic Sugartown
Historic Yellow Springs
Honey Brook Food Pantry
Hope Partnership for Education
Hopeway Foundation
Humane Animal Partners
Independence Mission Schools
Indian Valley Public Library
Int'l Orthodox Christian
Charities
Int'l Relief Teams
Isaac Bruce Foundation
Ivy Hill Foundation
J. Wood Platt Caddie
Scholarship Trust
Jaws Youth Playbook
Jenner's Pond
Jersey Surf
Juvenile Diabetes Foundation
K9s for Warriors
Kendal-Crosslands
Communities
Kennett After School
Association-After the Bell
Kennett Area Community
Service
Kennett Area Park Authority
Kennett Area Senior Center
Kennett Education Foundation
Kennett Flash
Kennett Heritage Center
Kennett Library
Kennett Symphony of ChesCo
Kennett Underground Railroad
Center
Kimberton Community Fair
Kisses for Kyle
Knights of Columbus Charities
Kutztown University
Foundation
Lake Wallenpaupack
Watershed Mgt District

Lancaster General Health
Foundation
Lantern Theater Company
Laundromat Library League
LCH Health & Community
Services
Legal Aid SEPA
LGBT Equality Alliance
Lighthouse Youth Center
Linc Worldwide
Lincoln University
Littleton Academy
Living Beyond Breast Cancer
Logan's Heroes Animal Rescue
London Grove Friends Meeting
Lord's Pantry of Downingtown
Lucky Dawg Animal Rescue
Ludwigs Corner Fire Company
No 1
Lundale Farm
Lutheran Church of our Savior
M28 Ministries
Maloto
Malvern Retreat House
Martin Luther King Community
Gr Kennett
Maryland Horse Foundation
Maternal & Child Health
Consortium
Mercy Presbyterian Church
MidAtlantic Horse Rescue
Mighty Writers
Mill at Anselma Preservation
Ed Trust
Millersville University
Mission Working Dogs
Missionaries of Charity
Montgomery County
Community College
Moore College of Art & Design
Mosaic Place
Movember Foundation
Museum of the American
Revolution
Mushroom Festival
Musicopia
Napa Valley College Foundation
National Iron & Steel Heritage
Museum
Natural Heritage Trust
Natural Lands
Nava Center
New London Counseling Center

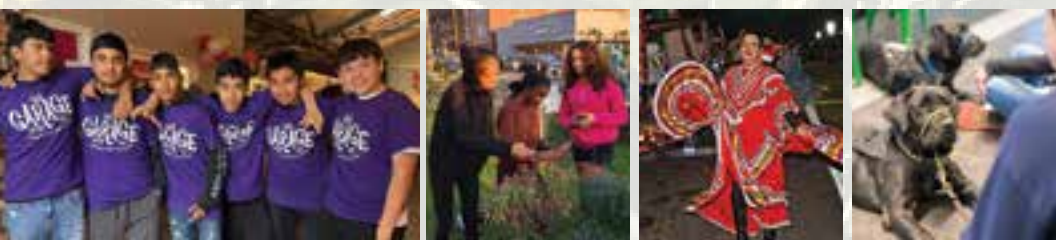
New Voters
New York Blood Center
North Carolina Veterinary
Medical
North Star of ChesCo
Operation Breakthrough
Oregon Food Bank
Orion Communities
Outcast Rescue
Oxford Area Neighborhood
Services
Oxford Arts Alliance
Oxford Educational Foundation
Oxford Senior Center
PA Home of the Sparrow
PA SPCA
PA State Association of County
Fairs
Pancreatic Cancer Action
Network
Paoli Hospital Foundation
Parish Hall Kitchen
Parkesburg Library
Parkesburg Point
Partners for Children & Families
Partners in Outreach
Paws 2 Freedom
Paws for Purple Hearts
Peace Love and Poms Rescue
Inc.
Peirce College
Penn State Brandywine
Penn State University
People's Light
People's Pantry-Church Rd
Pet Adoption League NY
Petra Community Housing
Phila Animal Welfare Society
Phila Chamber Music Society
Phila Ronald McDonald House
Philabundance
Phoenix Animal Rescue
Phoenixville Area Community
Services
Phoenixville Area High School
Phoenixville Area Senior Center
Phoenixville Community
Education Foundation
Phoenixville Free Clinic
Phoenixville Public Library
Phoenixville Women's
Outreach - The House



Planned Parenthood
Federation of America
Planned Parenthood SEPA
Prevent Child Abuse America
Primitive Hall Foundation
Project Akilah
Project Home
Quaker City Farmers
Quaker School at Horsham
Radnor High School Scholars
Fund
Real Life Ministry
Redeem
Rescue Express
RESOLVE: The National
Infertility Association
Retired Racehorse Project
Rhy's Above
Riddle Health Care Foundation
Rowan University Foundation
Runway for Recovery
Rylies Rescue
Sacred Heart Church
Safe Harbor of ChesCo
Saint Aloysius Parish School
Salvation Army Gr West
Chester
Salvation Army Phila
San Antonio Food Bank
Sandhills Children's Center
Save the Children
Schuylkill River Heritage Center
ServeNow
Serving Inspiring & Loving
Others
Settlement Music School
Sisters of the I.H.M.
Smith College
Southern Smoke Foundation
Sow Good Now
Speak Up
Special Olympics PA
St. Agnes Day Room
St. Agnes School
St. John the Beloved Catholic
School
St. Katharine Drexel Church
St. Katharine of Sienna School
St. Luke Evangelical Lutheran
Church
St. Mary's Franciscan Shelter
St. Michael Lutheran Church
St. Nicholas Patriotic Society

St. Norbert Catholic Church
St. Norbert Catholic School
St. Peter's Lutheran Church
Stroud Water Research Center
Sunday Breakfast Mission
Surrey
Team CMMD
Temple University
Tester Construction Gives
Things of My Very Own
Thorncroft Equestrian Center
Timothy Foundation
Tredyffrin & Easttown Care
Thorndale Downingtown
Rotary
Thoroughbred Retirement
Foundation
Tick Tock Early Learning Center
To Love a Canine Rescue
Tom Coughlin Jay Fund
Tower Fdtn of San Jose State
University
Treasure House - Phoenix
Tredyffrin Township
Tri-County Community
Network
Tri-State Bird Rescue &
Research
Trustees of the University of PA
Tunnel to Towers Foundation
UNICEF
Union Fire Co #1
Unite for HER
United States Army Ranger
Association
United Way of ChesCo
United Way of S ChesCo
University of Michigan
Uptown! Knauer Performing
Arts Center
Urban Promise Ministries
Community Development
Variety - The Children's Charity
of the Delaware Valley
Veterans Association of
Easttown & Tredyffrin
Township
Veterinarian School at U of PA
Villa Maria Academy High
School
Villanova University
Vision Corps
Volunteer English Program

Wayne Art Center
West Chester Area Day Care
Center
West Chester Area Senior
Center
West Chester Business
Improvement District
West Chester Dance Works
West Chester Food Cupboard
West Chester Friends School
West Chester Parks &
Recreation
West Chester Public Library
West Chester University
Foundation
West Goshen Lions Club
West Grove Fire Company
West Vincent Township Police
Department
Westminster Presbyterian
Church
Westside Community Center
Westtown Goshen Rotary
Foundation
Westtown School
Wharton Esherick Museum
Whimsicalitea
WHYY Channel 12 PBS TV
Willistown Conservation Trust
Willistown Friends Meeting
Educational Fund of the
Trustees
Willowdale Chapel
Wilson College
Wine to Water
WITF-TV PBS
Women's League for Minority
Education
Woodstock Farm Sanctuary
World Affairs Council of Phila
World Central Kitchen
YMCA of Greater Brandywine
YMCA Wilkes-Barre
Young Life
Young Life Capital Region
Young Men and Women in
Charge
Young Moms
Youth Mentoring Partnership
Zoe Ministries





In 2026, America Celebrates the 250TH ANNIVERSARY of the Founding of Our Nation

Throughout 2026, the 250th anniversary of the Declaration of Independence is a precious opportunity to inspire the American spirit. It's time to better understand our nation's founding principles, such as **equality, liberty, freedom of speech, freedom of religion, freedom of assembly, and due process of law.**

With the Community Foundation managing the day-to-day promotion, outreach and countywide heritage infrastructure fundraising, America 250 PA Chester County aims to help all people:

- **encounter the many ways in which Chester County participated in and influenced our nation's past, and**
- **elevate everyone's understanding of our continuing journey to build a more perfect union.**

The rich history of Chester County **reflects as well as shapes** our ongoing **pursuit of happiness for all.** Here,

- William Penn established a colony based on religious freedom and tolerance
- **agricultural bounty and industrial innovation** fueled our growth
- on Chester County land, blood was shed in battles of the **American Revolution** to win our independence from Great Britain
- a deep-rooted commitment to social justice led to a strong **anti-slavery movement and women's right to vote.**

The America 250 PA Chester County Commission invites everyone to join the year-long commemoration.

MAKE HISTORY ★ INSPIRE & ENGAGE ★ START NOW

www.america250chesco.org



JUNETEENTH CELEBRATION

CULTURE BUILDS COMMUNITY

When the Founding Fathers signed the Declaration of Independence in July 1776, they knew there would be **unfinished business.** The second paragraph of the Declaration reads, "We hold these truths to be self-evident, that **all men are created equal...**"

However, enslaved people and women had no voting rights and little to no property rights. **The unalienable Rights of Life, Liberty and the Pursuit of Happiness were not self-evident for all.**

Nearly 100 years later, from 1861-1865 the **American Civil War** was fought, primarily over the long-standing disagreement over slavery. Although President Lincoln's January 1, 1863 **Emancipation Proclamation** was issued during the war, it had little to no impact on enslaved people's freedom in Southern states, as it **couldn't be enforced.**

Juneteenth, or June 19th, is the anniversary of the day that commemorates the end of slavery in the U.S., when General Granger arrived in Galveston, TX and freed 250,000 enslaved Black Americans: 2½ years after the Emancipation Proclamation and 2 months after the Civil War ended.

In 2021, President Biden signed the Juneteenth National Independence Day Act into law establishing **Juneteenth as a federal holiday.** The Community Foundation fosters Juneteenth commemorations throughout the region. Juneteenth organizers from **Coatesville, Kennett Square, Lincoln University, Phoenixville and West Chester** convene monthly, to plan and coordinate events.

- Today, Juneteenth celebrates **community, unity, respect, and understanding.**
- Juneteenth serves as a reminder that it's **up to all of us to be part of the solution.**
- **There's still so much work to do.**



www.culturechesco.org/juneteenth



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WHITFORD COUNTRY CLUB
3/5/24



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Never Tasted
So Good!*



SWEET CHARITY 2024 WINNERS



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Northbrook
Marketplace

BEST DESSERT
Professional Vote
New Street
Catering

MOST CREATIVE
Professional Vote
Feast Your Eyes
Catering

BEST DESSERT
Popular Vote
Delaware County
Community College

CHAIR'S CHOICE RECEPTION

RADLEY RUN COUNTRY CLUB • 6/13/24

Honoring Winifred Moran Sebastian Esq., Outgoing Chair
& Welcoming Zebulun Davenport Ed.D., Incoming Chair



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Governance & Nominating

Grants & Scholarships Policy

PANELS

Grant Award Panels

Scholarship Award Panels

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Equity & Access

Outreach Council-Estate
Attorneys

Outreach Council-CPAs



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We gratefully acknowledge our team of interns from West Chester University, who help with accounting data entry, database updates, research, website updates, social media, special events, and hundreds of administrative tasks.

