


2016 Philanthropic Report

Building Upon a Solid Foundation



LEHIGH VALLEY
Community Foundation



The Lehigh Valley Community Foundation is a major philanthropic hub in the region— we know and navigate the landscape of community needs to connect people who care to causes that matter.

Special thanks to LVEDC, Digital Feast, John Kish IV, Discover Lehigh Valley, and grantees for contributing photos to this report

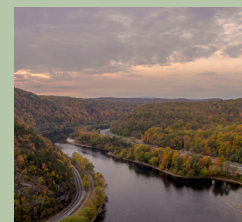
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Lehigh Valley Community Foundation

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Profiles in Philanthropy



George T. Walker Fund
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Joseph R. Gagnier
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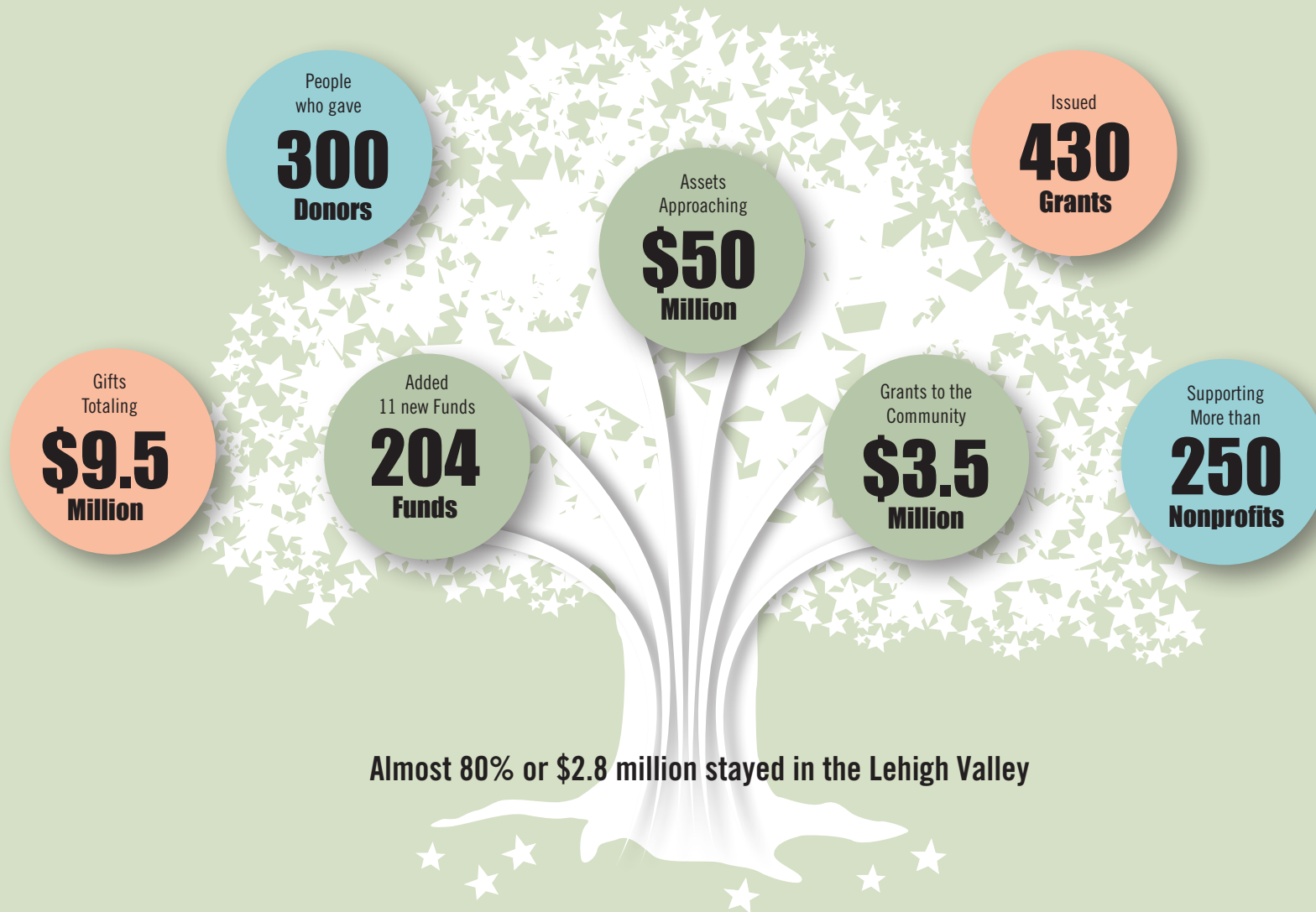


Kay and Marshall Wolff
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Confirmed in Compliance with National Standards
for U.S. Community Foundations



Fast Facts | FY 2015-16



Building Upon a Solid Foundation

Message from the Board Chair and President & CEO

This past fiscal year has been memorable for the Community Foundation, and we thank you—our friends, supporters, and colleagues—for your tremendous role in shaping the history of the Community Foundation.

First, our 200th charitable fund was established by Valley Youth House. Valley Youth House is a Lehigh Valley-based nonprofit that empowers and strengthens the lives of children and families. This fund marks a significant milestone not only in the Community Foundation's growth but also in our community support and visibility.

The Community Foundation received one of its largest bequests ever to establish the Delphine Quinn Perpetual Fund, a donor designated fund. The Community Foundation recognizes Delphine and her advisors for their forward-looking vision and support of the community.

We have increased our multi-year Impact Grants to include (1) a five-year, \$100,000 grant to the entrepreneur program of the Community Action Development Corporation of Bethlehem, and (2) a five-year, \$50,000 grant supporting veteran education at Lehigh Carbon Community College.

Perhaps most impressive, our total grantmaking in this past fiscal year reached a record \$3.5 million in support of the widest spectrum of charitable organizations.

On the horizon we will have some very exciting announcements about our 50th Anniversary celebration taking place in 2017. Our deep involvement in the community allows us to

recognize that the Community Foundation must be as responsive as possible to a wide range of needs and opportunities.

With this in mind, we intend to grant \$300,000 to special projects addressing six key community issues. Those issues are:

- Mental and Behavioral Health
- Cultural Enrichment
- Food and Housing Access
- Environment and Conservation
- Human Trafficking
- Veterans Affairs

These grants will invite community members to “Be the Spark”—a spark of awareness, a spark of change, a spark of connection. We're very excited about this celebration grant-making campaign and look forward to celebrating our 50th.

We would like to thank you for your continued support of philanthropy in our community.



A handwritten signature in black ink, appearing to read 'Michael Stershic'.

Michael Stershic
Chair, Board of Governors



A handwritten signature in black ink, appearing to read 'Bernard J. Story'.

Bernard J. Story
President & CEO

Types of Funds

Agency Funds | *Focusing on the Nonprofit Mission*

Establishing an agency fund allows a nonprofit to focus on its mission while benefiting from the operational efficiencies, oversight and visibility that LVCF offers.

Area-of-Interest Funds | *Choosing a Cause*

An area-of-interest fund supports programs & initiatives that tackle issues of your choosing, such as the environment, camperships, or no-kill animal shelters.

A donor-defined area-of-interest fund distributes grants based on the recommendations of a community committee that oversees a specific initiative.

A community area-of-interest fund distributes grants based on LVCF's community research to identify worthy charitable programs in the specified area-of-interest.

Community Partnership Funds | *Meeting the Region's Changing Needs*

Community Partnership Funds make sure the needs of tomorrow's Lehigh Valley are met. Donors rely on the deep community knowledge & experience of the Community Foundation to support the effective work of nonprofits throughout the region, forever.

Designated Funds | *Defining Your Giving*

Name specific nonprofits to receive grants, and we will make those grants over time. Should circumstances significantly change, our board can put the money to use for other similar charitable work. Giving parameters are set at the time the fund is established, so your giving is on auto-pilot. It is the most common way to preserve your charitable legacy.

Donor-Advised Funds | *Remaining Deeply Involved in Your Giving*

You recommend a grant, we do the paperwork and due diligence. We offer personalized service and deep community knowledge – a true partner in philanthropy.



Scholarship & Award Funds | *The Means to Further Education*

These funds allow donors to invest in the future by helping deserving students pursue higher education.

Unrestricted Funds | *Supporting Your Community Endowment*

The flexibility of unrestricted giving enables the Community Foundation to respond to the community's most pressing needs, including its own operations, today and tomorrow.

Charitable Funds

Agency Funds

Bethlehem AAUW Fund

Charles & Louise Hoffman Fund for the Bach Choir of Bethlehem

Bach Choir of Bethlehem Fund

Boys & Girls Club of Bethlehem Fund

Boys & Girls Club of Bethlehem Restricted Endowment #2 Fund

Burnside Plantation Fund

Junior League of the Lehigh Valley Agency Endowment Fund



Latino Leadership Alliance Scholarship Fund

Lehigh Valley Child Care Endowment Fund

Hunter Meckes Memorial Scholarship Fund

Endowment Fund of Meals On Wheels of Lehigh County, Inc.

Agency Endowment Fund of New Bethany Ministries

New Bethany Ministries Endowment-Robinson Fund

ShareCare Fund

United Way of the Greater Lehigh Valley Endowment Fund

David Rabaut United Way Fund For Neighborhoods

United Way of the Greater Lehigh Valley-Thun Endowment Fund

Endowment Fund to Further the Mission of Valley Youth House

FUND SPOTLIGHT



AGENCY FUND

Junior League of the Lehigh Valley Agency Endowment Fund

The Junior League of the Lehigh Valley Fund supports the development of volunteer and leadership skills for the organization's nearly 300 members. These skills are used in programs the League has developed to help reduce the educational gap in lower income communities. Programs include teaching children about healthy eating and fitness in Kids in the Kitchen, promoting family reading and literacy in Book Blast, and preventing "summer slide" with summer camp at Fountain Hill Elementary School. (pictured).

FUND SPOTLIGHT



COMMUNITY AREA-OF-INTEREST

The Erwin J. and Gertrude K. Neusch Fund

This Fund provides grants for charitable programs which benefit residents of Upper Bucks County, specifically those in the geographic area served by the Quakertown and Palisades School Districts. The programs of interest to the Neusch Fund are primarily, but not exclusively, in arts (including industrial arts), education, and rural life.

(Above) The fund supported scholarships for nursing students at St. Luke's Hospital's regional program in Quakertown, Pa.

Charitable Funds

Donor-Defined Area-of-Interest

City of Bethlehem Celebration Fund

Downtown Allentown Community Development Initiative Fund

Every 15 Minutes Fund

Lehigh County Medical Society Education Fund

Lehigh Valley My Brother's Keeper Fund

Lehigh Valley Social Impact Fund

Lehigh Valley Synergy Fund

Northampton County Bar Association Charitable Fund

PPL Operation HELP Fund

Saucon Sanctuary Fund

Community Area-of-Interest

Richard E. Gasser Fund

Margaret Haas Rotunno Memorial Fund for Local No Kill Shelters

Lehigh Valley Leader in Me Fund

Erwin J. & Gertrude K. Neusch Fund

Outdoor Recreation Fund for Youth

Lehigh River Fund

Robert D. & Gwendolyn-Jane Romeril Campership Fund

William C. Rybak Fund for People with Disabilities

Michael C. Schrader Fund

Leonard A. Wenzel Memorial Fund for South Bethlehem

Gene & Joan Witiak Fund



Michael C. Schrader Fund

Established in 1985 by Resolution of the Foundation's Board of Governors to commemorate the retirement of Attorney Michael Schrader, the Fund supports the work of non-profit organizations serving the indigent, sick or hungry. Attorney Schrader was the Foundation's first Executive Director from 1967-1985.

Community Partnership Funds for Foundation-Directed Grantmaking

250th Book Fund

E. Spencer & Nellie C. Addison Fund

Margaret Ann Bachert Fund

Frances L. Barnard Fund for Children

Randy H. & Ramona A. Bruch Fund

Community Fund for Arts, Culture & Heritage

Community Fund for Education

Community Fund for Environment & Science

Community Fund for Health Care

Community Fund for Human Services

Daniel-Holben Fund

Lucille F. Driver Fund

Donald & Alice Farquharson Fund

Ben Franklin Trust Fund

Fund for Community Development

Eugene G. Grace, Jr. Fund

Greene Family Fund

Deborah S. Haight Fund

Betsy & Jack Jordan Fund

Lehigh Valley Helping Hand Fund

Martina M. Malone Fund

Pine Fund In Memory of Mildred Beck Pine

Anthony J. Ruggiero Fund

FUND SPOTLIGHT



Lehigh Valley Helping Hand Fund

In the 1930s, a group of Allentown businessmen and civic leaders met monthly for a lunch. They collected proceeds to assist disadvantaged individuals with serious needs. Their charitable intentions were carried on by their children and grandchildren, through the Helping Hand Foundation. The Foundation was converted to a charitable fund at LVCF to preserve the original intention of the Foundation for generations to come. The fund supports programs and organizations that meet the needs of those who “fall through the cracks” in the provision of social and human services. It contributes almost \$30,000 to Foundation-directed grantmaking.

COMMUNITY PARTNERSHIP FUNDS FOR FOUNDATION-DIRECTED GRANTMAKING

Charitable Funds

Donor-Advised Funds

Alan & Marsha Abraham Fund

Arbor Insurance Group Foundation Fund

Arbor Insurance Group Community Fund

Barnette Fund

Walter & Alma Bastian Fund

BB&T Economic Growth Fund (Lehigh Valley)

Eric B. & Denise M. Blew Fund

Borda Family Fund

Cesar Bourdon Memorial Fund

Geoff & Wenda Boyer Fund

Bethlehem Rotary Club Fund

Building Fund

Burdette Family Fund

Michael J. & Sandra R. Caruso Fund

Mike Caruso Fund

Client 1st Foundation Fund

Barbara & Maxwell Davison Fund

Grace Kathryn & Jeffrey P. Feather Fund

W. Beall & Marlene O. Fowler Fund

Jean & Paul Franz Fund

Stephen & Joyce Gehringer Charitable Family Fund

Dolly Haltzman Foundation for the Arts Fund

Herr Fund

Ray & Donna Holton Charitable Fund

Kressler, Wolff & Miller Fund

Sylvia Fenstermacher Lawler Foundation for the Arts Fund

Lehigh County Lawyers' Charitable Fund

Robert H. & Jean C. Littner Fund

Lötter Family Fund

Lehigh Valley Coalition for Kids Fund

MAK Fund



Donor-Advised Funds (Continued)

John F. & Jane H. Malloy Fund

L. Charles & Ruth H. Marcon Fund

Dr. Richard D. Martin Memorial Fund

McNairy Family Fund

McNairy Fund

Olexa Family Foundation Fund

Ronald R. Perin Fund

Angela René Pessina Foundation Fund

Matthew & Erika Petrozelli Fund

Pharo Family Fund

Prometheus Fund

Raymond-Cryder Donor Advised Fund

J.B. & Kathleen Reilly Fund

Justin Sheftel Memorial Fund

Star Foundation Fund

Stershic Family Fund

St. Luke's Hospital Medical Staff Fund

Glenn M. Taggart Memorial Fund

Jack & Ann Follett-Terres Fund For
Compassionate Care

Donald H. & Mary R. Trautlein Fund

Two Tunics Fund

Charles Versaggi Futures Fund

Wombat Fund

Ilene & Robert Wood Striving To Make A
Difference Fund

Betty & Scotty Wood Memorial Fund

Stella C. Yee Memorial Fund

James & Naomi Yergey Fund

Ryan J. Zawada Memorial Fund

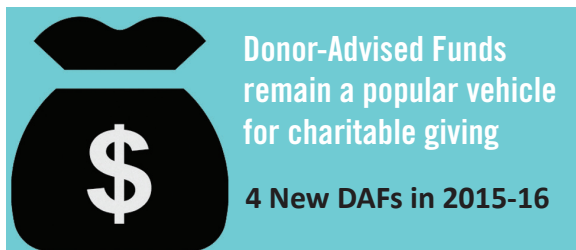


DONOR-ADVISED FUND

Cesar Bourdon Memorial Fund

Cesar Bourdon was known by many as a happy and generous man, always willing to help his family and others. During the Blizzard of January 2016, the 54-year-old naturally went outside to help clear pathways for his elderly mother and neighbors at the Little Lehigh Manor apartments in Allentown. But, after the strenuous shoveling, Cesar collapsed and died from a heart attack.

The story of Cesar's generous spirit has warmed the hearts of so many people. Talen Energy Corporation and Paul & Kym Farr established the Cesar Bourdon Memorial Fund in March 2016 to preserve Cesar's legacy of helping people, particularly the Lehigh Valley's senior citizens.



FUND SPOTLIGHT



DONOR DESIGNATED FUND

Equi-librium Therapeutic Horsemanship Fund

The fund serves as one of Equi-librium's endowments and provides an annual grant to support the organization's mission. The Fund was established by an anonymous donor who generously wished to make a permanent impact.

Equi-librium was founded in 2001 to serve children, youth and adults from Lehigh, Monroe and Northampton counties of Eastern Pennsylvania who face physical, developmental and/or psycho-social challenges. Over 100 individuals and groups come to the farm every week to participate in highly effective programs that help children with autism, developmental delays, cerebral palsy, at-risk behaviors.

Charitable Funds

Donor Designated Funds

William B. & Elizabeth Behr Agocs Geophysical Research Fund

American Red Cross-Lehigh Valley Chapter Fund

Clayton W. & Helen H. Bernhardt/V.J. Pazzetti, Jr. Fund

Bethlehem & Morning Star Rotary Clubs Scholarship Fund in Remembrance of Stephen P. Godbolt

Benjamin C. Boylston-Kemerer Museum Fund

Benjamin C. & Eleanor A. Boylston Fund for the Lehigh Valley Chapter, American Red Cross

Boys & Girls Club of Bethlehem Restricted Endowment #1 Fund

H. Bridges & Lucile P. Boylston Fund for First Presbyterian Church of Bethlehem, PA

Camp Compass Fund

Patrick J. & Christine Connell Fund

Marjorie S. & Joseph E. Correll Fund

Daniel-Holben Designated Fund

Leonard R. Dimmick Fund for Burnside Plantation

Equi-librium Therapeutic Horsemanship Fund

Fowler Family Fund

Joseph R. Gagnier Memorial Fund

Marion Brown Grace Memorial Fund

Luther J. Hottle Fund

Nancy S. & Charles E. Keenan Endowment Fund

Barry M. Kessler Charitable Fund

Kenneth & Elizabeth Kressler Fund

Deborah A. Libricz Memorial Fund

Magee Family Fund

Charles & Ruth Marcon United Way Fund

Mary & Jack McNairy Fund

Dr. Russell E. Morgan, Sr. Fund

Delphine Quinn Perpetual Fund

Raymond-Cryder Designated Fund

Safe Start Fund

Salesian Center Fund

Arthur E. Schaeffer Trust Fund

Shoemaker-Bond Home Association, Inc. Fund

Theatre Organ Arts Fund

Thun Fund

George T. Walker Charitable Fund

Yergey Fund for Muhlenberg College

Warren W. York Fund To Benefit The United Way Of The Greater Lehigh Valley

Grow-A-Fund

Dr. Charles L. Best Fund

Calabrese-Collina Wedding Celebration Fund

Andrew Rabbat Memorial Music Scholarship Fund

Anthony Severo Memorial Grow-A-Fund

Scholarships and Award Funds

Elizabeth Behr Agocs Scholarship Fund

Ann C. Bernard Memorial Scholarship Fund

Bethlehem Educational Scholastic Trust (B.E.S.T.) Fund

Debra "Frau" Brown Memorial Scholarship Fund

Reverend Douglas Caldwell Fund for Nursing Excellence

Truman L. Frey, Jr. Scholarship Fund

Miss Pennsylvania Scholarship Fund

Dr. Joseph A. Perna & Hilda Ramos Perna Memorial Scholarship Fund

William & Jamie Soukup Reid Memorial Scholarship Fund

Arthur E. & Myrl G. Schaeffer Scholarship Fund

Anthony Severo Memorial Scholarship Fund

Justin Sheftel Scholarship Fund

Woman's Club of Bethlehem Fund



SCHOLARSHIP FUND

The Reverend Douglas Caldwell Fund for Nursing Excellence

Established in 2014 through a gift from Reverend Caldwell's friends and colleagues at Bethlehem Area Moravians (BAM), the Fund provides grants to Moravian College and St. Luke's Hospital School of Nursing for awarding scholarships to students in their final year of study in preparation for a career in Nursing. The Fund was established in remembrance of Rev. Douglas Caldwell, a former member of the board of trustees of the BAM, Moravian College, St. Luke's Hospital, and the Lehigh Valley Community Foundation.

Charitable Funds

Scholarships and Award Funds (Continued)

Katie Stauffer Memorial Fund

Catherine Hilaire Thompson Nursing
Scholarship Fund

Edwin F. Van Billiard Scholarship Fund

Stephanie Olexa & Seth Weber Scholarship Fund

WHS 2006 Football Champions Scholarship Fund

Betty Williams Memorial Scholarship Fund

Unrestricted Funds

Adams Final Fund

Rolland L. Adams Fund

Rolland L. & Pauline H. Adams Fund

Aaron Burr Baldree Fund

Madeline S. & Frank R. Barnako Fund

Clayton W. & Helen H. Bernhardt Fund

Bethlehem 225th Anniversary Fund

Buckley Family Fund

Dorothy & Joseph Conroy Fund

Helen Adams DeRiemer Fund

Globe Times/WGPA Charities Fund

Carol Dean Henn Community Fund

Kutteroff Family Fund

Frank L. Marcon Fund

Horace R. Miller Fund

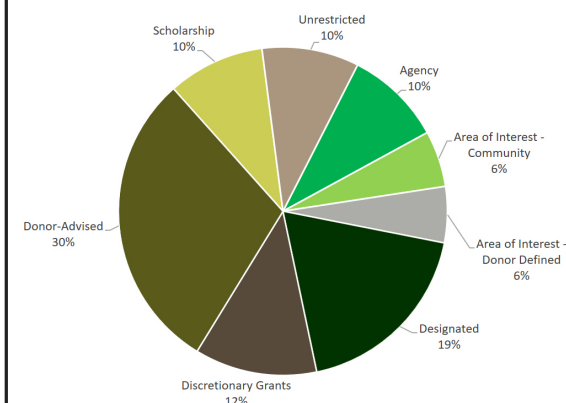
Operating Endowment Fund

Perna Family Fund

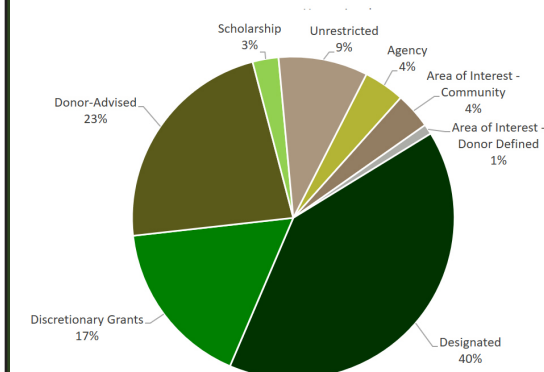
Albert M. Reed Fund

Katharine March & Stanley J. Thomas
Memorial Fund

204 Charitable Funds: by Count



204 Charitable Funds: by Dollars



New Charitable Funds

AGENCY FUNDS

- Endowment Fund to Further the Mission of Valley Youth House

DONOR-ADVISED FUNDS

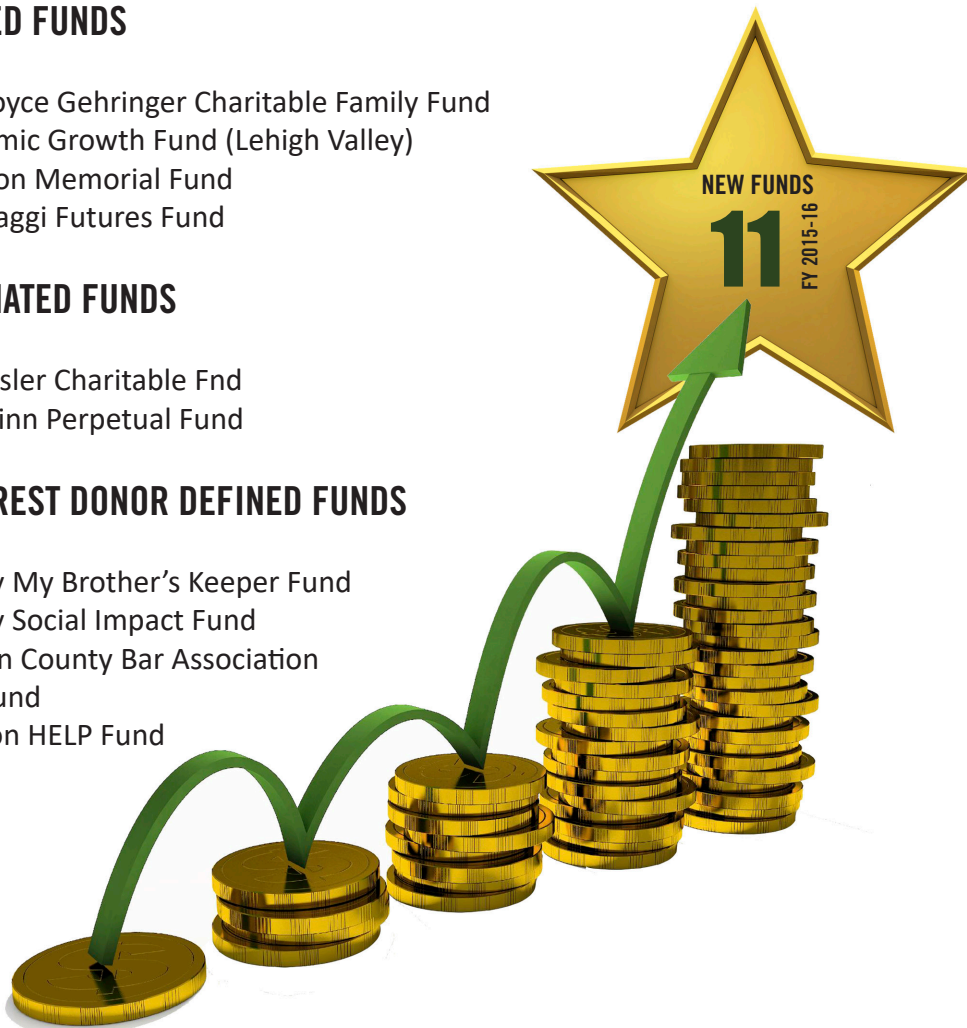
- Stephen & Joyce Gehringer Charitable Family Fund
- BB&T Economic Growth Fund (Lehigh Valley)
- Cesar Bourdon Memorial Fund
- Charles Versaggi Futures Fund

DONOR DESIGNATED FUNDS

- Barry M. Kessler Charitable Fnd
- Delphine Quinn Perpetual Fund

AREA-OF-INTEREST DONOR DEFINED FUNDS

- Lehigh Valley My Brother's Keeper Fund
- Lehigh Valley Social Impact Fund
- Northampton County Bar Association Charitable Fund
- PPL Operation HELP Fund



GIFTS 2015-16

THANK YOU

Donors (Alphabetical by Last Name)

Marsha & Alan Abraham

Mr. & Mrs. Wayne Achey

Richard Adams, Jr.

Association of Fundraising Professionals
Eastern Pennsylvania Chapter

Mimi & Kamran Afshar

Air Products

Mike & Lynn Albarell

Margaret & Robert Anderson

Sarah M. Andrew

Richard Angel

Ettore J. Angelo

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Dr. Robert D. Barraco

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William M. Berger

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Raymond K. & Helen I. Berk Fund

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Joseph C. Bernstein

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Denise & Eric Blew

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Helen & Geoff Borda

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Wenda & Geoffrey Boyer

Mr. & Mrs. Ronald S. Bracalente

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Carole K. & Keith A. Brown

Marguerite H. & W. Douglas Brown

Brian Buckelew

Butz Foundation

Dolly & Lee Butz

Greg L. Butz

Cactus Blue

Joseph Cahill

Kathy & Anthony Calabrese

Mr. & Mrs. Santino Calantoni

Juan Camacho

Carla & Thomas Campbell

Capital Blue Cross

Faust E. Capobianco IV



The George T. Walker Fund

Profile in Philanthropy

George Walker lived a humble life in the Pocono Mountains of Pennsylvania. He was very generous, and he was especially careful to support organizations doing so much for their communities without asking for reimbursement or charging fees. He wished to continue this legacy of “helping those who help others” after his lifetime. He sought guidance from his financial advisor and estate planning attorney on how to incorporate his charitable wishes into his estate plans. The legacy gifts resulting from his considerable estate had the potential for significant impact. His professional advisors recommended a charitable fund at the Lehigh Valley Community Foundation as a way to give to organizations in his absence. Read George’s story at www.lvcfoundation.org

Grants from the Fund have included:

St. Jude Children’s Research Hospital – Proton Therapy Center & Preparation Room: Proton Beam Therapy is the most advanced form of radiation technology. St. Jude’s Proton Therapy Center is the first in the world dedicated solely to children and designed for young patients.

Guiding Eyes for the Blind – Pennsylvania Challenge Grant: This innovative grant approach was a dollar-for-dollar challenge to leverage the Walker Fund to raise additional support from other donors across Pennsylvania.

Salvation Army of East Stroudsburg – Emergency Shelters: Grants have supported an important shelter facility for single men and single women, a separate unit for single mother and child, and townhouse family shelters for multiple families.

GIFTS 2015-16

Donors Continued (Alphabetical by Last Name)

Attorney & Mrs. Douglas Cappellini

Patty & Ian Carlis

Michael J. Caruso

Centennial Education Foundation

Century Fund

Johanna & Mark Chehi

Mary Ann & Gregory Christensen

City Center Investment Corporation

City of Allentown

Client 1st Financial

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Christine & Patrick Connell

Cookcross

Estate of Joseph E. Correll, Jr.

Sally & Joseph Corvino

County of Lehigh

Bonnie Coyle & Joel Ronco

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John Lisz Daniel & Carol Holben Daniel

Kevin F. Danyi

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Maureen & David Decker

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Paul & Kym Farr

Jeff & Kathy Feather

Lynn & Samuel Feldman

First Northern Bank & Trust

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Beall Fowler

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Barry Frey

Barbara & James Fromhartz

Frances A. Fruhwirth

Gadomski Foundation

Susan & Bob Gadomski

Honorable James Knoll Gardner

Joyce & Stephen Gehringer

THANK YOU

Nana-Marie & William Gernerd

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Mr. & Mrs. Edward Giera

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Gavin P. Holihan

Donna & Ray Holton

Luther J. Hottle, Jr.

Billee & James Hurley

Abele A. Iacobelli

Ironton Elementary School

Camille JeBran

2015-16 GIFTS | AT A GLANCE

 **9.5** Total Gifts
Million

300 
Individual Donors

 Gave to...
60 Charitable Funds

2 Large Gifts 
\$5 Million
bequest for a permanent designated fund

\$2.5 Million corporate donor-advised fund

 **Appreciated Securities**
remain a popular gift type



Sponsors

- Abraham, Borda, Corvino, Butz, LaValva & Company, PC
- Eric B. & Denise M. Blew Fund
- Norris McLaughlin & Marcus, P.A.
- Butz Foundation

Corporate Match

- Merck Foundation
- Microsoft

In-Kind

- DeSales University
- Elizabeth Mulrine Catering
- Martha Phelps
- Special Events Tents & Party Rentals
- Valley National Financial Advisors

GIFTS 2015-16

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Junior League of the Lehigh Valley

Emil W. Kantra II

George & Barbara Karr

David & Jean Kelley

Barry M. Kessler

Keystone Savings Foundation

Dr. & Mrs. John Kintzer

Patrick & Renee Kleaveland

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Amy & Michael Klotz

Tara & Jim Knicos

Michele & James Kosh, Jr.

James J. Kozuch

Ken & Beth Krick

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Natalie & Scott Kriner

Gwin M. Krouse

Pat & Stan Kunka

Attorney Stephen & Marion Lanshe

Paul A. Lauricella

James I. Lawler

Lehigh Gas Foundation

Lehigh Gas Partners

Lehigh Valley Health Network

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Robert H. & Jean C. Littner

Sandy & Bob Lovett

Pat & Tucker Lyons

Machs Gute Pub & Grille Inc.

Elizabeth & Robert Malacoff

William G. Malkames

Jennifer Mann

Charles & Ruth Marcon

Meredith & James Margolis

Estate of Christine J. Martin

Donors Continued (Alphabetical by Last Name)

THANK YOU

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Pamela Martin

Susan G. Maurer

Richard Mayberry

Will Mayhall & Linda Foell

Natalie McCabe

James J. McConnell

Robin S. McCool

Slade H. McLaughlin

Attorney Donald & Mrs. Julia Miles

Attorney C. Steven & Mrs. Rill Ann Miller

Nancy Ann & Marvin Miltenberger

Lisa & Robert Moatz

Barbara & Robert Moffett

Matthew Moors

Cassie & Rick Moors

Thomas Moroz

Michael E. Moyer, Esq.

Maria C. Mullane

Christine F. Murphy

Christine & William Murphy

Furaha Mushingi

National Penn Bank

Vanessa M. Nenni

New Bern Historical Society

New Bethany Ministries

Noonan & Prokup

Northampton County Bar Association

Andrew Offenbacher

Dr. Stephanie Olexa & Attorney Seth Weber

Judith & Bruce Palmer

Kay & Michael Park

Carol & David Pearce

Honorable & Mrs. Henry S. Perkin

Peter P. Perry

Michael & Michele Pessina

Martha Phelps & Clyde Halstead

Honorable William & Mrs. Maureen Platt

Ellen Porette

Dave & Lois Post

PPL Services Corporation

Estate of Delphine S. Quinn

Attorney Audrey & Mr. Guillermo Racines

Ann & Peter Raines

Mr. & Mrs. Brian Regan

Honorable Edward Reibman

Ruth & Joseph Reichard

Anne & James Reid

J.B. & Kathleen Reilly

John & Nora Reilly

Meredith & Aaron Rettaliata

Cynthia & Jeffrey Retterer

Dorothy Rider Pool Health Care Trust

Rev. Canon Gwendolyn-Jane & Robert D. Romeril



GIFTS 2015-16

Donors Continued (Alphabetical by Last Name)

Ashley & Joe Russo

Saleem S. Saab

Sacred Heart Healthcare System

Lorrie Scherline

Melissa L. Schwartz

Scoblionko, Scoblionko, Muir & Melman

Carolyn Scott & W. Robert Simpson

John P. Servis

Linda & Elliot Sheftel

Ronnie & Matt Sorrentino

Mr. & Mrs. Donald A. Squair

St. Luke's University Hospital

Helen Z. Stauffer

Steckel & Stopp, Attorneys-at-Law

Sybil & Michael Stershic

Sam & Barbara Stettler

Maggie & Tom Stoneback

Bernard & Margaret Story

John O. Stover, Jr., Esq.

Melinda & Christopher Stumpf

SUEZ Energy Resources NA, Inc.

SVCC Men's Golf Committee

Jon A. Swartz

Glenn M. Taggart Family Foundation

Talen Energy

Nora Lee Tarney

Chris Taylor

Jack Terres & Ann Follett-Terres

Anne & Robert Teufel

David & Wendy Littner Thomson

Catherine A. Tighe

Jeffrey Tomlinson

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Patricia Traynor

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Harry C. Trexler Trust

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Turczyn Law Offices

Michael C. Usher

Valley Youth House

Robert Van Horn

Michele A. Varricchio

Holly A. Vaughn

Jennifer & Louis Ventura

Charles Versaggi, Jr.

Beverly & Ambrose Virgo

Sally & John Virgo

Vision Entertainment Group

Judy & Bruce Waldman

John Walton

Andrew & Kris Warner

Mr. & Mrs. Jonathan P. Warner

Kimberly A. & Robert E. Weinberg
Robert A. Weinert

THANK YOU

Robert G. Weiss Family Foundation

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Susan Ellis Wild

Deborah Williams

Kay & Marshall Wolff

Judy & Doug Woosnam

Attorney & Mrs. A. Judd Woytek

Kathryn Wright

James & Naomi Yerger

Donald S. Young

Mary & Edwin Youtz

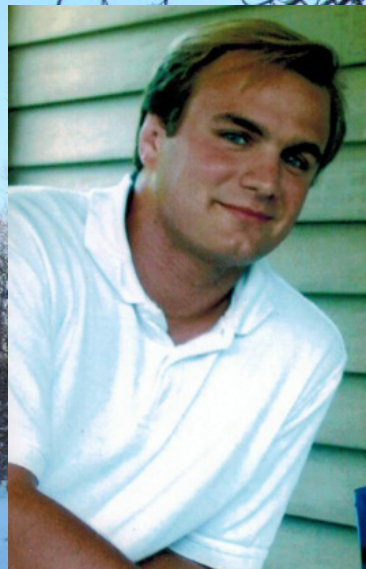
Zamborsky & Zamborsky Law Offices

Joseph A. Zator II

Diane & Joseph Zawada

Susan B. & Edward G. Ziegler

Michael Zisman & Linda Gamble



Joseph R. Gagnier Memorial Fund Profile in Philanthropy

In 2005, the parents of Joseph Gagnier, a young man lost to suicide, established a designated fund at the Community Foundation. On March 13, 2016, his mother Mary Youtz, presented a talk of remembrance and encouragement at the BuxMont Unitarian Universalist Fellowship, in Warrington, Pa. Read Mary's words, **Reaching for Healing and Hope**, on the Foundation's website, www.lvcfoundation.org.

The fund was established by Mary and her husband to remember Joseph by providing for annual grants to the Boys & Girls Club of Allentown for the Make Your M.A.R.K. Program, which stands for Motivated Academically Ready Kids. It is an after-school tutoring program where teachers tutor students in grades 2 through 5 in reading, writing and math. Joe majored in elementary education and he loved interacting with children, so his legacy continues through these grants.



Rolland L. Adams Society

Governors Club

Donors who have cumulatively donated in excess of \$500,000 to an active LVCF fund.

Rolland* & Pauline* Adams

Dr.* & Mrs.* William B. Agocs

Anonymous Donors

Walter & Alma Bastian Foundation

William H. Burdette*

Michael J. Caruso

Lawrence W.* & Nancy R. Herr

Luther J. Hottle, Jr.

Lehigh Valley Helping Hand Foundation

Charles & Ruth Marcon

National Penn Bank

Pharo Family Foundation

Louise Moore Pine*

Delphine S. Quinn*

Raymond-Cryder Foundation

J.B. & Kathleen Reilly

George T. Walker*

All gifts to the Lehigh Valley Community Foundation have an important impact on the Lehigh Valley community. The generosity of individuals and organizations enables the Foundation to continue with its mission to improve the quality of life within the Lehigh Valley. Support is critical to the mission of the Foundation and the health of the Lehigh Valley community.

The Rolland L. Adams Society is the Foundation's leadership giving society established to recognize and honor the generosity of our donors.

Philanthropists Club

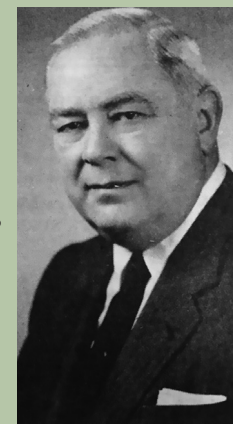
Donors who have established or directed the establishment of endowed funds

| | |
|----------------------------------------|-------------------------------------------|
| Rolland* & Pauline* Adams | Mr. & Mrs. Benjamin C. Boylston |
| Dr.* & Mrs.* William B. Agocs | Carole K. & Keith A. Brown |
| Anonymous | David F. Brown |
| Arbor Insurance Group | Ramona A. & Randy H. Bruch |
| Margaret A. Bachert* | Marjorie & Walter Buckley, Jr. |
| Frank R. Barnako* | Dolly & Lee Butz |
| Frances L. Barnard* | Michael J. Caruso |
| Hank & Joanne Barnette | Nancy & L. William Clark |
| Walter & Alma Bastian Foundation, Inc. | Martin D. Cohen, Esq. |
| Louis E. Bernard | Patrick & Christine Connell |
| Clayton W.* & Helen H.* Bernhardt | Joseph M. Conroy* |
| Bethlehem Area Moravians, Inc. | Joseph E. Correll, Jr.* |
| Bethlehem Educational Scholastic Trust | John Lisy Daniel & Carol Holben Daniel |
| Bethlehem Rotary Foundation | Honorable Maxwell & Mrs. Barbara* Davison |
| Denise & Eric Blew | Helen Adams DeRiemer* |

*Denotes deceased members who are now 'ad astra'...among the stars.

1967

Rolland Adams is one of the founders of the Lehigh Valley Community Foundation. Born in rural Huntingdon, Pennsylvania, Rolland Adams attended Dickinson College before becoming a bank examiner. He purchased the Bethlehem Globe Times in



ROLLAND L. ADAMS

1929 at the worst of the Great Depression and turned it around. In addition to being named Publisher and Owner of the Bethlehem Globe Times, he was the President of the Bethlehem City News Company and the A.B.E. Broadcasting Company. Adams also purchased the Atlantic City Press. In 1963, he purchased 90% holding of both the Pittsburgh and Bethlehem Coca-Cola bottling factories.

Adams was well-known in the community and was instrumental in the construction of the Bethlehem Public Library. After his death, Adams became the first million-dollar donor in the Foundation's history with his \$1,000,000 unrestricted bequest which, at the time, represented a five-fold increase in the assets of the Foundation.

Rolland L. Adams Society

Philanthropists Club

Donors who have established or directed the establishment of endowed funds

Leonard R. Dimmick*

Lucille F. Driver*

Alice M. Farquharson*

Linny* & Beall Fowler

Benjamin Franklin*

Fr. Daniel G. Gambet OSFS

Richard E. Gasser*

Mary & Robert* Gedney

Joyce & Stephen Gehringer

Franklin B. Gillespie, Jr.*

Eugene G. Grace, Jr.*

Deborah S. Haight*

Louise* & Charles* Hoffman

Luther J. Hottle, Jr.

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Nancy S.* & Charles E.* Keenan

Keystone Savings Bank

Elizabeth Kressler*

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Karen & Fred Kutteroff

Anne M. & Bruce J. Lawrence

Lehigh River Foundation

Lehigh Valley Coalition for Kids

Lehigh Valley Helping Hand Foundation

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Martina M. Malone*

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Dr. Stephanie Olexa & Attorney Seth Weber

Ronald R. Perin*

Dr. Joseph A. Perna*

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Pharo Family Foundation

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Anne & James Reid

Thomas E. Rotunno

Anthony J. Ruggiero*

William C. Rybak, Esq.*

Arthur E.* & Myrl G.* Schaeffer

Larry & Jean Severo

THANK YOU

Community Supporters Club

Donors who have cumulatively given at least \$10,000 for LVCF unrestricted use, to non-endowed funds or to an existing endowed fund.

Jack Terres & Ann Follett-Terres
 Katharine M.* & Stanley J.* Thomas
 David & Wendy Littner Thomson
 Liz & Ferd Thun
 Elizabeth & Samuel Torrence
 George T. Walker*
 Dr. Leonard A. Wenzel*
 Gene & Joan Witiak
 Kay & Marshall Wolff
 Family of Stella Yee
 Warren W. York Trust
 Mary & Edwin Youtz

Marsha & Alan Abraham
 Air Products & Chemicals, Inc.
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 Bethlehem Rotary Foundation
 Bethlehem Steel Corporation
 Denise & Eric Blew
 Helen & Geoff Borda
 Frank & Beth Ann Williams Boyer
 Wenda & Geoffrey Boyer

Mr. & Mrs. Benjamin C. Boylston
 Carole K. & Keith A. Brown
 David F. Brown
 Marjorie & Walter Buckley, Jr.
 William H. Burdette*
 Dolly & Lee Butz
 Butz Foundation
 Capital Blue Cross
 Michael J. Caruso
 Century Fund
 City Center Investment Corporation
 City of Allentown
 Client 1st Financial
 Helen Coleman*
 Christine & Patrick Connell
 County of Lehigh

***Denotes deceased members
 who are now 'ad astra'...
 among the stars.**



Rolland L. Adams Society

Community Supporters Club

Donors who have cumulatively given at least \$10,000 for LVCF unrestricted use, to non-endowed funds or to an existing endowed fund.

John Lisy Daniel & Carol Holben Daniel

James Doran

Dorothy Rider Pool Health Care Trust

Jill & Alfred Douglass III

Duggan & Marcon Inc.

Cynthia A. Lambert Durham & Fred S. Durham III

Educators Mutual Life

Jeff & Kathy Feather

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Linny* & Beall Fowler

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Lutron Foundation

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Christine J. Martin*

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Thomas Moroz

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Northampton County Bar Association

Michael & Michele Pessina

Erika & Matthew Petrozell

Robert Pharo*

Roswell Dean Pine* & Louise Moore Pine*

PPL Services Corporation

Erma L. Reed*

THANK YOU

President's Club

Donors who gave \$1,000+ for unrestricted use last year

J.B. & Kathleen Reilly

Rev. Canon Gwendolyn-Jane & Robert D. Romeril

Thomas E. Rotunno

Sacred Hearth Healthcare System

Justin Sheftel Memorial Fund

St. Luke's University Hospital

St. Luke's University Hospital Medical Staff

Sybil & Michael Stershic

Glenn M. Taggart Family Foundation

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Katherine S. Merle-Smith Thomas*

John Thompson, Jr.

David & Wendy Littner Thomson

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Charles Versaggi, Jr.

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Kay & Marshall Wolff

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Helen & Geoff Borda

Greg L. Butz

DeSales University

Beall Fowler

Trisha & Gary Higgins

Cynthia A. Lambert Durham & Fred S. Durham III

Charles & Ruth Marcon

Meredith & James Margolis

Ann & Peter Raines

Ronnie & Matt Sorrentino

Bernard & Margaret Story

Kay & Marshall Wolff





Kay and Marshall Wolff Profile in Philanthropy

For Kay and Marshall Wolff, involvement with community organizations and initiatives has been a special source of satisfaction. Kay has served on the boards of ProJeCt of Easton, Third Street Alliance, and the Northampton County Historical and Genealogical Society, and she leads tours at the historic Easton Cemetery. A great deal of Marshall's community focus has been on the work, mission, and potential of the Lehigh Valley Community Foundation. Marshall completed two nine-year terms of service on the Foundation's Board of Governors, and he chaired the Foundation's finance committee for many years. His day job is serving as president of Kressler, Wolff, and Miller Insurance Company, a firm established by Marshall's grandfather in 1923.

Read Kay and Marshall's story at www.lvcfoundation.org

Charitable Giving

"The Foundation exists largely to help other people to fulfill their charitable goals and dreams," Marshall says. His family has been very pleased to have established the MAK Fund, a donor-advised fund at the Foundation. Kay points out that a charitable fund can be flexible. "With the options offered to donors when the fund is created, the fund can continue to be used in a good way even if the initial grantees cease to exist. The concept of 'legacy' is almost synonymous with the Community Foundation."

Through their MAK Fund, the Wolffs have supported a number of organizations over the years:

- Allentown Art Museum
- East Area Community Center
- Easton Area Public Library
- Easton Heritage Alliance
- Greater Easton Development Partnership
- Habitat for Humanity Lehigh Valley
- Lehigh Valley Community Foundation
- Trexler Game Preserve
- Lehigh Valley Zoological Society
- Pennsylvanian Sinfonia Orchestra
- Pocono Health Foundation
- ProJeCt of Easton

Legacy Society

THANK YOU

Rolland Adams*

Dr. William B. Agocs*

Anonymous Donors

Margaret A. Bachert*

Madeline S. Barnako*

Frances L. Barnard*

Hank Barnette

Rebecca J. Bartholomew

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John G. Drauch

Lucille F. Driver*

Cynthia A. Lambert Durham

Alice M. Farquharson*

Nancy Flemming

Benjamin Franklin*

Grete & Stanley Furrow



The Legacy Society recognizes and honors these donors who have made deferred gifts through their will or other planned giving to give back through the Community Foundation. We are grateful for their generosity and philanthropic vision and are pleased to honor and recognize them.

*Denotes deceased members who are now 'ad astra'...among the stars.

Legacy Society

THANK YOU

Fr. Daniel G. Gambet, OSFS

Richard E. Gasser*

Deborah S. Haight*

Linda & Ned Heindel

Robert Heinsohn

Carol Dean Henn

Louise* & Charles* Hoffman

Mary Hook

Luther J. Hottle, Jr.

Nancy S.* & Charles E.* Keenan

Jean G. Kessler

Anthony A. & Judy A. Krasnicke

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Bernard & Margaret Story

Maria K. & Edward P. Street, Jr.

Eileen C. Sundell

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Katharine M. Thomas*

Susan & Dennis Tretter

George T. Walker*

Stevie Gay Weart

Dr. Leonard A. Wenzel*

Robert C. Wood*

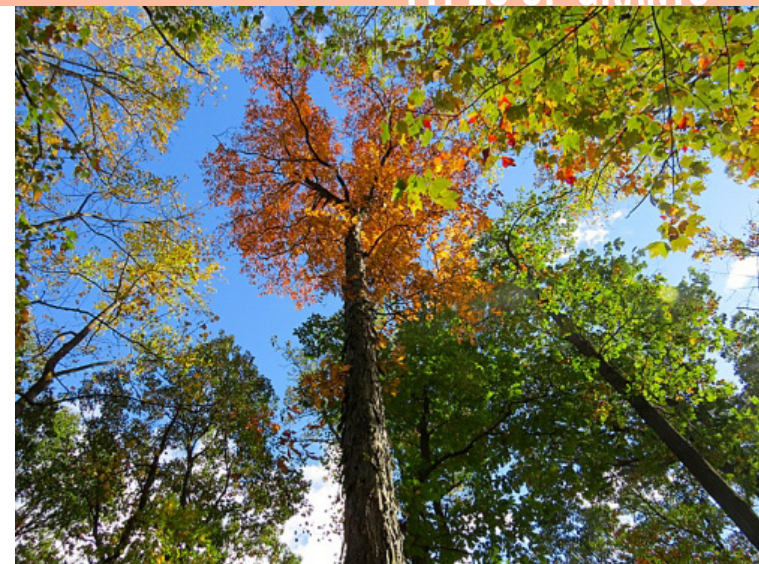
Mary Youtz

GRANTS 2015-16

TYPES OF GRANTS

Philanthropic Partner Grants

| | |
|-------------------------------------------|------------------------------------------------------------|
| Allentown Art Museum | The Baum School of Art |
| Allentown Band, Inc. | Beat the Streets Philadelphia |
| Allentown Rescue Mission | Bel Canto Children's Chorus of the Bach Choir of Bethlehem |
| Allentown School District | Bethlehem Branch - AAUW |
| Allentown School District Foundation | Bethlehem Area School District |
| Allentown Symphony Association | Bethlehem Soccer Club |
| America on Wheels, Inc. | Boys & Girls Club of Allentown |
| American Cancer Society-Philadelphia | Boys & Girls Club of Bethlehem |
| American Center for Law and Justice | Bradbury-Sullivan LGBT Community Center |
| American Diabetes Association | Bright Hope Pregnancy Support Centers |
| American Heart Association | Burnside Plantation, Inc. |
| American Red Cross of Lehigh Valley-Bucks | Community Action Committee of the Lehigh Valley, Inc. |
| American Red Cross of the Poconos | Camelot for Children, Inc |
| Animal Food Bank of the Lehigh Valley | Camp Compass, Inc. |
| ArtsQuest | Cancer Support Community of the Greater Lehigh Valley |
| Bach Choir of Bethlehem | |



Philanthropic Partner Grants

Grants from charitable funds established by individuals and corporations to support a wide range of community needs.

One-Time Community Grants

Foundation-directed grants to meet specific one-time project needs in Bucks, Lehigh, Monroe & Northampton counties.

Multi-Year Impact Grants

Foundation-directed five-year grants to support collaborative projects in Lehigh & Northampton counties.

(Photo) A Shagbark Hickory Tree at Mariton Wildlife Sanctuary

GRANTS 2015-16



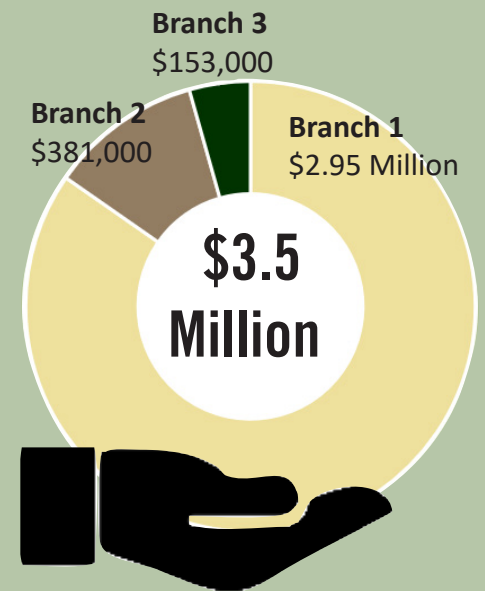
Allentown Band
The Universe at an Exhibition

Philanthropic Partner Grants (continued)

| | |
|-------------------------------------------------------|--------------------------------------------|
| Carcinoid Cancer Foundation | Cross International, Inc. |
| Casa Guadalupe Center | Da Vinci Science Center |
| Catholic Charities of the Diocese of Allentown | Deborah Hospital Foundation |
| Center for Vision Loss | Delaware Valley University |
| Central Moravian Church | DeSales University |
| Chamber Music Society of Bethlehem | Diakon Lutheran Social Ministries |
| Child Care Information Services, Inc. | Drexel University |
| City Line Little League, Inc. | Easton Area Community Center |
| Civic Theatre of Allentown | Easton Area Public Library |
| Clarks Summit University | Effort United Methodist Church |
| Communities in Schools of the Lehigh Valley | Emmanuel Evangelical Congregational Church |
| Community Action Development Corporation of Bethlehem | Equi-Librium, Inc. |
| Community Bike Works | Evangelical Lutheran Church in America |
| Community Music School | Feed the Children, Inc. |
| Community Services for Children | First Presbyterian Church of Allentown |
| Concordia Evangelical Lutheran Church | First Presbyterian Church of Bethlehem |
| Concordia Lutheran Church | First Presbyterian Church-St. Petersburg |

GRANTMAKING IN 2016

Over **430** individual grants
to **250** organizations



Branch 1: Philanthropic Partners Grants

Through individual donor-defined funds, LVCF makes grants to meet a wide range of needs.

Branch 2: One-Time Community Grants

At its discretion, LVCF makes grants supporting specific one-time projects.

Branch 3: Multi-Year Impact Grants

At its discretion, LVCF makes grants to support multi-year collaborative projects.

| | |
|--------------------------------------------------|-------------------------------------------------|
| Fordham University | Kellyn Foundation |
| Forgotten Felines & Fidos, Inc. | KidsPeace National Centers, Inc. |
| Friends of Levitt Pavilion at SteelStacks | Lafayette College |
| Girl Scouts of Eastern Pennsylvania, Inc. | Latino Leadership Alliance of the Lehigh Valley |
| Good Shepherd Catholic School | Lehigh Conference of Churches |
| Good Shepherd Rehabilitation Network | Lehigh County Historical Society |
| Guiding Eyes for the Blind, Inc. | Lehigh University |
| Hawk Mountain Council #528 Boy Scouts of America | Lehigh Valley Active Life |
| Hawk Mountain Sanctuary Association | Lehigh Valley Charter High School for the Arts |
| Hispanic Center Lehigh Valley | Lehigh Valley Children's Centers, Inc. |
| Historic Bethlehem Partnership, Inc. | Lehigh Valley Girls Rock |
| Hope Community E.C. Church | Lehigh Valley Hospital |
| Ironton PTO | Lehigh Valley United |
| J. Wood Platt Caddie Scholarship Trust | Lehigh Valley Area Soccer Club |
| Jewish Community Center of Allentown, PA | The Literacy Center |
| The Juilliard School | Longswamp Union Cemetery Association |
| Juvenile Diabetes Research Foundation | Lustgarten Foundation |

GRANTS 2015-16

Philanthropic Partner Grants (continued)

Lutheran Theological Seminary of Philadelphia

Masonic Charities Fund

Mayfair, Inc.

Meals on Wheels of Lehigh County

Miller-Keystone Blood Center

Miracle League of the Lehigh Valley

Monroe County Conservation District

Moravian Academy

Moravian Manor

Moravian Open Door, Inc.

Moravian Village of Bethlehem

Morningstar Senior Living, Inc.

Mount Pocono United Methodist Church

Muhlenberg College

National Multiple Sclerosis Society Greater

Delaware Valley Chapter

National Museum of Industrial History

National Wrestling Coaches' Association

National Wrestling Hall of Fame

Neighborhood Housing Services of the Lehigh Valley, Inc.

New Bethany Ministries

New Life Solutions

New School

Northampton Community College Foundation

Northampton County Historical & Genealogical Society

Northeast Ministry

NORWESCAP, Inc.

Our Lady of Perpetual Help Roman Catholic Church

Parkland High School

Parkland School District Education Foundation

PBS39/WLVT

Peddie School

Pennridge Community Center

Pennsylvania Sinfonia Orchestra

Pinebrook Family Answers

Point Pleasant Presbyterian Church

Pratyush Sinha Foundation

Project Lifesaver International

ProJeCt of Easton, Inc.

Promise Neighborhoods of the Lehigh Valley

Reading Choral Society

Repertory Dance Theatre

Rotary Foundation

Sacred Heart Foundation

Safe Harbor Easton

Salvation Army Greater Philadelphia

Samaritan's Purse

The School Sisters of Saint Francis

The Seed Farm

GRANTEE SPOTLIGHT



PHILANTHROPIC PARTNER GRANT

The Literacy Center

The Literacy Center is challenged to meet an increasing student demand for English as a Second Language(ESL) instruction that includes workforce initiatives. With the \$15,000 Community Partnership grant, the Literacy Center revamped its ESL instruction to include workforce initiatives which were designed to place students in career pathways and sustainable employment opportunities. Initiatives included: exploring career options; field trips to potential employers; and mentoring and shadowing.

Shanthi Project

ShareCare Faith in Action

Southern Lehigh Public Library

Springfield Township Bucks County

St. Anne Education Endowment Fund

St. Anthony Health Foundation

St. Benedict's Preparatory School

St. James Lutheran Church

St. John's UCC Church

St. Luke's University Hospital

St. Peter's United Methodist Church

St. Thomas More Church

The Theatre Organ Society of the Delaware Valley, Inc.

Third Street Alliance for Women & Children

Trinity United Methodist Church

Turning Point of Lehigh Valley

Two Rivers Health & Wellness Foundation

United Friends School of the Greater Lehigh Valley

United Way of the Greater Lehigh Valley

University of Pennsylvania

Valley Youth House

VIA of the Lehigh Valley, Inc.

Victory House of Lehigh Valley

Village Earth

Visiting Nurse Association of St. Luke's

West Chester University Foundation

Wildlands Conservancy

Wildwood Catholic High School

William Allen High School

Winchester Seniors Association, Inc.

Young People's Philharmonic

Zion's United Church of Christ

GRANTEE SPOTLIGHT



ONE-TIME COMMUNITY GRANTS

Lehigh Valley Audubon Society

With a goal of fostering lifelong interest in and knowledge of birds, the Lehigh Valley Audubon Society held two programs for children ages 6-13 – Breeding Bird Counts for Kids and Christmas Bird Count for Kids. Participants learned birding basics, including how to identify common birds, and then participated in an hour-long bird count in an Allentown Park.

GRANTS 2015-16

One-Time Community Grants (Foundation-directed)

| | |
|---------------------------------------------|---------------------------------------------------|
| Allentown Art Museum | Diakon Lutheran Social Ministries |
| Allentown Band, Inc. | East Penn Neighbors Helping Neighbors |
| Allentown Public Library | Easton Area School District |
| Allentown School District | Embrace Your Dreams |
| Allentown Symphony Association | Equi-Librium, Inc. |
| Bach Choir of Bethlehem | Friends of Johnston, Inc. |
| Ballet Guild of the Lehigh Valley | Friends of Levitt Pavilion at SteelStacks |
| Bangor Area School District | Girl Scouts of Eastern Pennsylvania, Inc. |
| Bethlehem Area School District | Good Shepherd Rehabilitation Network |
| Bucks County Community College Foundation | Hillside School |
| Children At-Promise Early Learning Center | Holy Family Manor Nursing & Rehabilitation Center |
| Civic Theatre of Allentown | Laughing At My Nightmare, Inc. |
| Communities in Schools of the Lehigh Valley | Lehigh County Historical Society |
| Community Bike Works | Lehigh Gap Nature Center |
| Cooks Creek Watershed Association, Inc. | Lehigh University |
| Dartmouth-Hitchcock Medical Center | Lehigh Valley Arts Council |
| DeSales University | Lehigh Valley Audubon Society |

PHOTO SPOTLIGHT

Lehigh Valley Storytelling Guild

Lehigh Valley Zoological Society

Manito Life Center

Mariton Wildlife Sanctuary and Wilderness Trust

Mayfair, Inc.

Mercy School For Special Learning

Miller-Keystone Blood Center

Mock Turtle Marionette Theater

Muhlenberg College

National Inventors Hall of Fame

National Museum of Industrial History

No Kill Lehigh Valley

Northampton County Historical & Genealogical Society

Northeast Ministry

Pennsylvania Shakespeare Festival

Police Athletic League of Allentown

Promise Neighborhoods of the Lehigh Valley

Public Library of Catasauqua

Quakertown Community School District

Quota International of Bethlehem

Repertory Dance Theatre

Riegelsville Public Library

Royce's Rescue

Salisbury Township School District

SATORI

St. Luke's Hospital - Quakertown Campus

The Baum School of Art

The Literacy Center

The School Sisters of Saint Francis

The Seed Farm

Upper Bucks YMCA

Valley Youth House

WDIY-FM, LV Community Public Radio

Weller Health Education Center

Wildlands Conservancy



Baum School of Art
Summer Art Camp

GRANTS 2015-16

Multi-Year Impact Grants

Community Action Committee of the
Lehigh Valley, Inc.

Community Action Development
Corporation of Bethlehem

Da Vinci Science Center

Lehigh Carbon Community College
Foundation

Lehigh Gap Nature Center

Lehigh Valley Leader In Me Fund

Lehigh Valley Synergy Fund

Pinebrook Family Answers

State Theatre Center for the Arts, Inc.



Lehigh Gap Nature Center

Lehigh Gap Nature Center's (LGNC) Landscaping Program focuses on well designed native plant gardens that benefit wildlife and communities. The program is designed for middle- and low- income residents and focuses on replacing traditional landscapes (requiring significant inputs of fossil fuels, pesticides, and fertilizers that degrade waterways and ecosystems) with well-designed native plantings benefiting public health through cleaner soil and water.

AWARDS

Bethlehem Educational Scholastic Trust (B.E.S.T.) Fund

Bernie Cohen B.E.S.T. Award
Jane Langyore, East Hills Middle School

Anthony Ruggiero B.E.S.T. Award
Joe Stellato, Freedom High School

Seymour & Sophie Haber B.E.S.T. Award-
Kathy West, Donegan Elementary School

William B. & Elizabeth Behr Agocs

Geophysical Research Fund

Ms. Eszter Békési

Ms. Virág Darányi

Ms. Tünde Lehelvári

Shoemaker-Bond Home Association, Inc. Fund

Citizenship Essay Contest winners

McKenna Tinsman
Claire Johnson
Class of 2016 Valedictorian

Sarah Betts
Class of 2016 Salutatorian
Caroline Weidner

SCHOLARSHIPS

Elizabeth Behr Agocs Scholarship Fund
Elizabeth Behr Agocs Scholarship

St. Luke's School of Nursing

Ann C. Bernard Memorial Scholarship Fund
Ann C. Bernard Memorial Scholarship

Raven Miller
Northern Lehigh High School

Debra "Frau" Brown Memorial Scholarship Fund
Debra "Frau" Brown Memorial Scholarship

Patrick Kantner
Muhlenberg College

Ross Sonnenblick
Tufts University

Reverend Douglas Caldwell Fund for Nursing Excellence
Reverend Douglas Caldwell Nursing Scholarship

Sarah Heiser
Moravian College

Truman L. Frey, Jr. Scholarship Fund
Truman L. Frey, Jr. Scholarship

Hannah Bouard
Northampton Community College

Stephanie Olexa & Seth Weber Scholarship Fund

Stephanie Olexa and Seth Weber Scholarship for Life Sciences

Noelle Lucien
Trinity College

Stephanie Olexa and Seth Weber Scholarship for Criminal Justice

Scott Brenner
American University

Dr. Joseph A. Perna & Hilda Ramos Perna Memorial Scholarship Fund
Dr. Joseph A. Perna & Hilda Ramos Perna Memorial Scholarship

Camila Padilla
Case Western Reserve University

SCHOLARSHIP SPOTLIGHT

Justin Sheftel Scholarship Fund



Kristin Krause
Penn State University

I would like to thank the Sheftel family and the selection committee for choosing me to be the recipient of such a prestigious scholarship established in Justin's name. I was honored to be able to meet the criteria to apply for the scholarship, and I truly cannot express my emotions when my name was announced as the 2016 recipient!



Alex Clewell
University of Pittsburgh

It is with great pride that I was selected to receive the Justin Sheftel scholarship. As a recipient of this prestigious scholarship I am humbled to be in the same company as Justin and the previous recipients. When I read the essay prompt for the Justin Sheftel scholarship I immediately felt a connection to Justin and his family.

SCHOLARSHIPS

William & Jamie Soukup Reid Memorial Scholarship Fund

William & Jamie Soukup Reid Memorial Scholarship - Phillipsburg High School

Alexandra N. Mayo
Princeton University

Arthur E. & Myrl G. Schaeffer Scholarship Fund

Arthur E. & Myrl G. Schaeffer Scholarship

Max Vogel
Clemson University

Thayjas Patil
University of Pittsburgh

Anthony Severo Memorial Scholarship Fund

Anthony Severo Memorial Scholarship

Jacob Lizak
University of Pennsylvania

Justin Sheftel Scholarship Fund

Justin Sheftel Memorial Scholarship

Kristin Krause
Penn State University

Alex Clewell
University of Pittsburgh

Katie Stauffer Memorial Fund

Katie Stauffer Memorial Scholarship

Kayla Ann Reigh
Penn State University

Catherine Hilaire Thompson Nursing Scholarship Fund

Catherine Hilaire Thompson Nursing Scholarship

Brooke Rau
DeSales University

WHS 2006 Football Champions Scholarship Fund

WHS 2006 Football Champions Scholarship

Chavi Sharma
University of Pittsburgh

Alexia Claudio
Bloomsburg University

Betty Williams Memorial Scholarship Fund

Betty Williams Memorial Scholarship

Maricelys Marrero
Northampton Community College

Woman's Club of Bethlehem Fund

Woman's Club of Bethlehem Scholarship

Bridget Tarnowski
University of North Carolina



PROGRAM HIGHLIGHTS 2015-16

Charles & Ruth Marcon Honored by Foundation with Vision in Philanthropy Award

The Lehigh Valley Community Foundation presented **Charles and Ruth Marcon** with the prestigious 2016 Vision in Philanthropy Award. More than 130 guests attended the celebration to honor the Marcons hosted by the Foundation at the National Museum of Industrial History in Bethlehem during June of 2016.

The Lehigh Valley Community Foundation presents the prestigious Vision in Philanthropy Award to those generous individuals and families who have chosen to establish a Fund at the Community Foundation as a method of supporting charitable organizations, and in so doing, have demonstrated a deep and meaningful commitment to philanthropy in the Lehigh Valley. Past recipients of the award include **Michael Caruso, Linda Sheftel, Carole Brown, and Father Dan Gambet.**

Charles Marcon is president of Duggan & Marcon, the largest employer of union carpenters in the region, doing business from the Lehigh Valley to the New York State border, and serving Berks, Bucks, and Schuylkill Counties. He is the Chair of the Board of the National Museum of Industrial History. ■



FINANCIAL PLANNING FORUM FOR WOMEN

TUESDAY, MAY 24, 2016

9:30 - 9:45 a.m. Registration
9:45 a.m. - 12:30 p.m. Program Q&A and Discussion

PRESENTERS:



**Erika Riddle
Petrozelli,**
Director of Donor
Services and
Communications



Tina Lombardi,
of Counsel with
the Law Firm
of Fitzpatrick, Lentz
and Bubba



Trisha Higgins,
CPA, Vice President
and CFO at the Lehigh
Valley Community
Foundation



Laurel Spagnolo,
Vice President for
Mission Support,
Presbyterian
Senior Living

Promoting LVCF and Philanthropy Through Events and Engagement

The LVCF held a number of events for professional advisors, donors, community leaders, and others to increase visibility and awareness of the Foundation, promote its services, and serve as “convener” and philanthropic hub in the Lehigh Valley.

Breakfast with Bernie series of discussions on charitable planning topics were very successful. The first of the Educational Sessions for Professional Advisors was **2015 Philanthropic Outlook**. Bernie Story shared his insights into philanthropy in the Lehigh Valley - the major players, the current trends, the rising needs, and the role of collective impact.

Other programs included **From Gift to Grant, and The Ins & Outs of Donor-Advised Funds**, sponsored by **The Eric & Denise Blew Fund**, focused on DAFs offered by LVCF and how they differ from other platforms. **Foundations as Trusts or Corporations? Choosing the Right Fit** focused on using the appropriate legal entity in structuring a foundation to meet the donor’s goals. The project was presented by **Robert Jacobs, Esq., Steve Molder, Esq.,** and host **Bill Murphy, Esq.** ■

Geoffrey Boyer Receives 2016 Service to Philanthropy Award

The Lehigh Valley Community Foundation presented the 2016 Service to Philanthropy Award to **Geoffrey Boyer** of Boyer Financial Group, at the Foundation's annual Professional Advisors Seminar held at Lehigh Country Club on January 21, 2016.

The Service to Philanthropy Award recognizes a professional advisor that understands and appreciates the importance of philanthropy in the community, the diverse advantages of charitable giving for his clients, and the value of philanthropy in estate, retirement, and wealth management planning.

LVCF Hires Mason Investment Advisory Services



In August of 2015, LVCF announced a new investment consultant relationship with Mason Investment Advisory Services and held a program featuring **Greg Druehl** of Mason, who discussed LVCF's investment approach, how Mason will support LVCF, and important considerations for endowment portfolio management. ■

Mr. Boyer, who holds the Certified Financial Planner certification, has over 25 years of financial services experience that spans the fields of financial planning, investments, insurance and banking. He established Boyer Financial Group in 1983 and is also a founding director of Embassy Bank for the Lehigh Valley. ■



Pictured above is Bernie Story, President & CEO, Lehigh Valley Community Foundation; Geoffrey Boyer, 2016 Service to Philanthropy Award recipient; and Dolores Laputka, Norris McLaughlin & Marcus, P.A. and Chair of Professional Advisors Committee.

"The Lehigh Valley Community Foundation connects people who care to causes that matter and works with professional advisors to help clients give to the community in a simple and personalized way."

IN THE NEWS

BB&T

BB&T acquisition prompts creation of \$5M in corporate donor-advised funds

When the BB&T's \$1.8 billion acquisition of National Penn was finalized in April 2016, it spurred the creation of two corporate donor-advised funds to support community and economic development. National Penn made the \$5 million donation to the Lehigh Valley Community Foundation and The Berks County Community Foundation as part of its merger process.

With each organization receiving \$2.5million, the funds will allow both community foundations to support charitable projects and initiatives that affect economic development efforts in Berks County and the Lehigh Valley.

"A community foundation is a really good choice for the corporate world in setting up economic funds for charitable needs," Story said. "We are working with BB&T to determine how the funds can best spur economic growth the Lehigh Valley."

The funds' advisory committee members are BB&T Group Executive Scott V. Fainor, and BB&T advisory board members Thomas A. Beaver, CPA, and Jeffrey P. Feather, both former directors at National Penn. ■

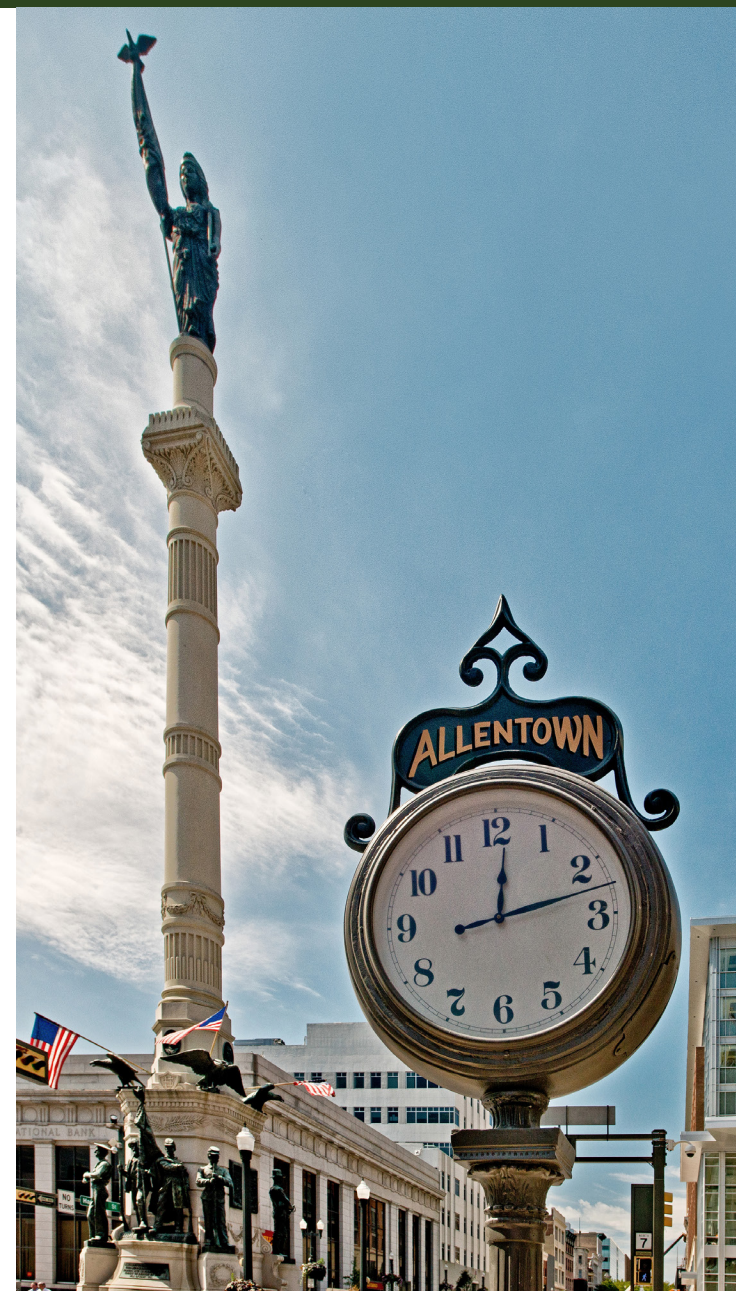
FINANCIAL INFORMATION

STATEMENT OF FINANCIAL POSITION

June 30, 2016 & 2015

| | 2016 | 2015 |
|---------------------------------------|----------------------|----------------------|
| ASSETS | | |
| Cash | \$ 3,469,093 | \$ 1,186,683 |
| Investments | 40,398,692 | 37,789,171 |
| Investments-Split Interest Agreements | 485,053 | 507,428 |
| Life Insurance Policy Gifts | 233,919 | 221,558 |
| Other Assets | 33,061 | 19,248 |
| Total Assets | <u>\$ 44,619,818</u> | <u>\$ 39,724,088</u> |
| LIABILITIES | | |
| Accounts Payable | \$ 28,344 | \$ 13,258 |
| Grants Committed | 210,500 | 169,170 |
| Funds Held for Organizations | 1,785,090 | 2,012,590 |
| Liabilities-Split Interest Agreements | 475,619 | 490,444 |
| Total Liabilities | <u>\$ 2,499,553</u> | <u>\$ 2,685,462</u> |
| NET ASSETS | | |
| Unrestricted Net Assets: | | |
| Permanent Endowment Funds | \$ 35,489,704 | \$ 32,698,394 |
| Temporary Funds & Reserves | 6,621,127 | 4,323,248 |
| Temporarily Restricted Net Assets | 9,434 | 16,984 |
| Total Net Assets | <u>42,120,265</u> | <u>37,038,626</u> |
| Total Liabilities & Net Assets | <u>\$ 44,619,818</u> | <u>\$ 39,724,088</u> |

The official registration and financial information of the Lehigh Valley Community Foundation may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, (800) 732 - 0999. Registration does not imply endorsement.



STATEMENT OF ACTIVITIES

Years Ended June 30, 2016 & 2015

| | 2016 | 2015 |
|------------------------------------|---------------|---------------|
| REVENUE | | |
| Gifts | \$ 4,403,560 | \$ 2,639,827 |
| Gifts from Bequests & Trusts | 5,100,300 | 255,600 |
| In-Kind Gifts | 36,375 | 50,857 |
| Net Investment Activity | (490,639) | 294,565 |
| Other Income | 12,808 | 16,105 |
| Total Revenue | \$ 9,062,404 | \$ 3,256,954 |
| EXPENSES | | |
| Grants | \$ 3,326,804 | \$ 2,589,806 |
| Operating Expenses: | | |
| Asset Development & Donor Services | 261,320 | 297,655 |
| General & Administrative | 188,435 | 170,083 |
| Grantmaking & Community Leadership | 204,206 | 189,401 |
| Total Operating Expenses | \$ 3,980,765 | \$ 3,246,945 |
| CHANGES IN NET ASSETS | \$ 5,081,639 | \$ 10,009 |
| NET ASSETS, JULY 1 | 37,038,626 | 37,028,617 |
| NET ASSETS, JUNE 30 | \$ 42,120,265 | \$ 37,038,626 |

A complete copy of the Community Foundation's audit is available on our website
www.lvcfoundation.org.



Board of Governors 2015-16

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Discover Lehigh Valley

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Northampton County Magisterial District

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* Denotes Past Chair

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Easton, PA

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Director of Communications



Corrina Lillis
Grants Assistant



Thank you for your partnership in serving
the Lehigh Valley Community



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Visit us online
www.lvcfoundation.org



The official registration and financial information of the Lehigh Valley Community Foundation may be obtained from the Pennsylvania Department of State by calling, toll free, within Pennsylvania 800.732.0999. Registration does not imply endorsement.

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



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