

Lehigh Valley Community Foundation

2022-23 PHILANTHROPIC REPORT



Fostering Inclusive Leadership
and Developing Equitable Organizations

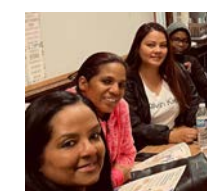


At the Lehigh Valley Community Foundation, we *connect donors who care with causes that matter*. A leader in charitable giving in the Lehigh Valley for more than 55 years, we receive support from donors, manage funds to grow over time, and make impactful grants to strengthen local nonprofits.

Lehigh Valley Community Foundation

Fostering Inclusive Leadership and Developing Equitable Organizations

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Lehigh Valley Community Foundation

LVCF Fast Facts 2022-23

Assets Reached

\$76+ Million

Added 21 New Funds

291 Total Funds



Grants to the Community

\$7.2+ Million

Received Gifts

\$8.6+ Million

Issued

780 Grants

Supporting

399 Nonprofits



Message from the Board Chair & President and CEO

The Foundation has made incredible strides during the fiscal year 2022-23 thanks to the unwavering support of our Staff, our Board of Governors, and our philanthropic partners. We continued to build on our strengths and address our limitations to secure our future as a trusted, agile, and transformational community leader.

In this year’s annual report, we’re inviting you to see what we’ve been up to, particularly our CORE Fellowship program to build inclusive leaders and equitable organizations. This work is nuanced, layered, and complex, but we keep showing up each day because the work is important, the future of our community is important and you are important.

While on this incredible journey of community leadership, we continue to focus on what we have always done – connecting people who care to causes that matter. We welcomed 21 new funds this year across

a diverse set of interests. We distributed over \$7.2 million dollars to the community, of which almost 90% stayed right here in the Greater Lehigh Valley. As a community endowment, we exist to do good today and in the future. We prioritize a healthy balance of leveraging our resources to address current critical community needs, while sustaining our funds to ensure our ability to respond to future needs that are sure to arise.

We are excited to share these highlights and more from last year. We encourage you to share the pages of this report with friends, family, colleagues, and community members. By spreading the word about our incredible work at the Community Foundation, you can help inspire others to join us in creating positive change. This report reflects your generosity to our community and your hard work, and for that, we are most thankful.

With deepest appreciation and gratitude,



Anne Reid
Anne Reid
Chair, Board of Governors



Erika Riddle Petrozelli
Erika Riddle Petrozelli, CPA, CAP®
President & CEO



CORE FELLOWSHIP

Fostering Inclusive Leadership and Developing Equitable Organizations

The Community Foundation launched the CORE Fellowship in July 2022. The [2022-2024 cohort](#) included 15 fellows from 8 organizations, as well as 5 systems-stakeholders (representing the business and government sectors) during the inaugural year for the immersive fellowship experience.

The [CORE Fellowship Program](#) is a two-year capacity building process designed to bring Lehigh Valley nonprofit leaders together to center equity in themselves, their relationships, their organizations, and the sector. As a part of the CORE Fellowship, organizations and fellows receive general operating funding, participate in nearly 50 hours of cohort convening over two years, receive five hours of individual leadership coaching, and participate in an organizational equity discovery process to assess the organization in how to best build capacity to become more equitable, resulting in an individualized organizational road-map for how to do the work.

Impact through CORE Fellowship

- 1) Each fellow will develop the skills, understanding, and capacity for inclusive leadership
- 2) Organizations will further their work in centering equity, having a plan and resources to understand how best to build their own capacity both in the fellowship and beyond
- 3) A diverse set of leaders will build and deepen relationships leading to a powerful social network of changemakers emerging. In turn, these individuals, organizations, and networks will harness their collective power to make equitable change in the nonprofit sector.

“The CORE Fellowship name signifies that this work will focus on addressing the core of our own selves, the core of our organizations, and the core of our systems,” noted **Megan Briggs**, LVCF Vice President of Community Investments. “As a funder in the Lehigh Valley, we recognize that nonprofits are working to incorporate equity into their organizations. Due to our positioning and experience, our approach is to support that work that needs to be done to reach equity by providing the infrastructure and resources necessary to both individuals and organizations.”

The Community Foundation partnered with experienced consultants to deliver the model, including **Phyllis Alexander**, **Guillermo Lopez, Jr.**, and **Carter Gilbert**. These consultants contributed in the program design and decision-making as well as facilitating the program. LVCF also partnered with [Partnering For Change](#) as the organizational development consultants for the fellowship. They conducted in-depth equity and organizational discovery process with time to carry out an equity-centered capacity-building project.



The CORE Fellowship program offers benefits to both the individuals in the cohort, but also their respective organizations. CORE Fellows receive leadership development coaching along with guidance from organizational development consultants on the creation of an equity-centered capacity-building project. Fellows also benefit from building connections to a network of nonprofit leaders. Overall, LVCF believes that the impact of the fellowship is powerful, important, and urgent.

“In the current time of polarization, the fellowship’s work to bring diverse people together in better understanding and appreciation of our many differences, in addition to understanding of our own and each other’s humanity is urgent, especially for those who work on the front line of making change in our community every day,” Megan explained.

See what [Fellows say](#) about CORE



Dolores Singletary
Board President



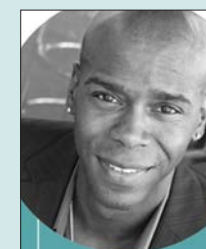
“ Relationships in the CORE Fellowship program are invaluable and have encouraged me to see myself differently and feel supported in that growth. ”



Katelyn Mack
President & Chief Operating Officer



“ The CORE Fellowship program is a community of changemakers that seek to lift each other up and create a more equitable and just Lehigh Valley. ”



Mark Wilson
Executive Director



“ The CORE Fellowship is a way for like-minded organizations to connect and support each others’ journey towards racial equity. ”



EARLY CHILDHOOD

Working towards high-quality, accessible childcare for all Lehigh Valley Families

During 2023, LVCF deepened our commitment to working collaboratively to address the crisis in the Early Childhood sector. In March 2023, [LVCF announced 12 grant awards](#), distributing nearly \$200,000 to organizations that are working towards providing high-quality, accessible childcare.

LVCF also awarded 3 of the 12 organizations with a 3-year multi-year grant award. **Alisa Baratta**,



Executive Director of Third Street Alliance, one of the three recipients of the multi-year grant award, demonstrates the importance of the award by saying, “The Foundation’s multi-year general operating grant supports our ability to build a strong and

sustainable infrastructure for our early childhood program. For example, we’re able to take risks and pilot new initiatives related to curriculum development and family engagement. This support also helps us advance our equity goals by allowing us to invest in living wages salaries for staff in our early learning program—a sector with a female-dominated workforce that has long been notoriously underpaid.”

“The Community Foundation’s goal in awarding these grants is to offer flexible funding to organizations that provide comprehensive approaches in engaging youth and their families with a focus on the early childcare sector,” explained **Megan Briggs**, LVCF’s Vice President of Community Investments. “Early childhood is one of the most critical periods of a child’s development. Quality childcare is a fundamental requirement of a vibrant, healthy economy. Yet, in the Lehigh Valley, and across the country, there is a crisis occurring in

early childhood education. With these grants, we seek to support childcare centers and help the many children that need care in the Lehigh Valley.”

The Community Foundation manages several different charitable funds that are focused on supporting Lehigh Valley youth and families, including:

- Edward & Inez Donley Fund
- Walter & Alma Bastian Fund
- Frances L. Barnard Fund for Children
- Support from Roger & Kathy Yott
- Lucille F. Driver Fund
- William C. Rybak Fund for Persons with Disabilities
- Robert D. & Gwendolyn-Jane Romeril Campership Fund
- Janice & Paul Gross Fund

LVCF recently launched a [new cycle of grant funding](#), which will support nonprofits addressing some of the root causes of the early childhood issue. During this fall of 2023, both **Erika Riddle Petrozelli**, CPA, CAP®, LVCF’s President and CEO, and **Megan Briggs** met with over 20 early childhood stakeholders to understand the current crisis, early childhood landscape, and how best the LVCF could help.

During these meetings, LVCF learned more about the root causes of the early childhood crisis, such as the issue with low pay for the entire field leading to workforce shortages, the increasingly complex behavioral and mental health diagnosis of children, and the lack of sufficient revenue sources to sustain high-quality programs. We learned about how this issue intersects with several impact areas including supporting babies and families, workforce development, overall economic well-being, transportation, and health.

The Community Foundation also learned about the efforts that local leaders are working on to address these challenges. LVCF is now developing the Foundation’s strategies that will help bolster the collective efforts to provide high-quality, accessible childcare for all Lehigh Valley families. LVCF looks forward to not only distributing grants in this area, but also utilizing its staff time, its voice, its positioning, and its resources to make an impact in the early childhood space.

Supporting Early Childhood

During the 2022-23 Grant Cycle, the Lehigh Valley Community Foundation recently distributed more than \$190,000 in general operating grants to area nonprofits serving youth and families with an emphasis on early childcare as part of its foundation-directed community investments grantmaking. The following grantees have received three multi-year awards:

- Resurrected Community Development Corp. (Pre-K Counts Initiative grads pictured below)
- Third Street Alliance for Women & Children
- Volunteers of America of Pennsylvania - The Children’s Center

Also grant one-time awards were awarded to the following grantees:

- Community Services for Children
- Greater Valley YMCA
- Lehigh Valley Children’s Centers, Inc.
- Pratyush Sinha Foundation Mindful Child Initiative
- NAMI Lehigh Valley
- Pinebrook Family Answers - Unconditional Care
- Saucon Valley Community Center
- Via of the Lehigh Valley

The grants applications were evaluated by the Youth & Families Advisory Grant Committee which included both content and context experts in the field of youth and families. Applications were evaluated based on the area of focus in meeting a critical gap in the current early childcare crisis, the population they serve, and how they are guided by the community in proving quality early childcare services.





ARTS, CULTURE & CREATIVE ECONOMY

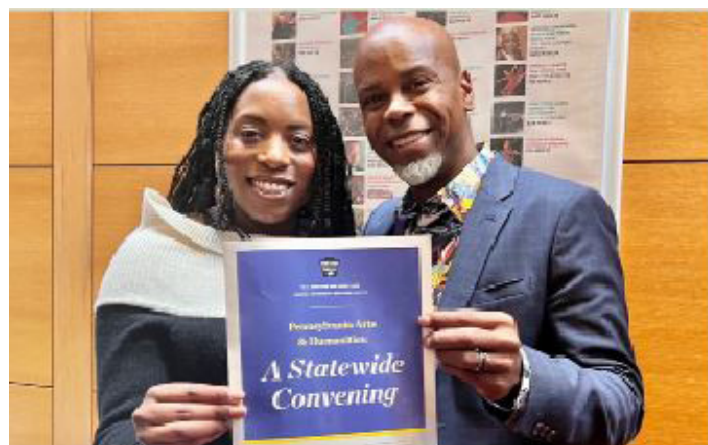
Your regional partner agency of the Pennsylvania Council on the Arts

During 2022-23, Lehigh Valley Community Foundation continues to redistribute state grant funding through the **Pennsylvania Council on the Arts (PCA)** Partners in the Arts program for Carbon, Monroe, Lehigh, and Northampton counties.

LVCF manages two distinct opportunities for funding through this program. The **Creative Entrepreneur Accelerator Program** helps creative entrepreneurs to grow their small business, audience, and revenue by providing \$2,000 grants. Since the grant launched in late 2021, over \$100,000 has been distributed to over 50 creative entrepreneurs.

LVCF also launched the **Creative Flex Fund**, a new PCA program in the summer of 2023, which is designed to address the changing needs of dynamic Pa. arts organizations by providing grantees the flexibility to use \$5,000 grants in ways that ensure the most significant impact for their organizations and communities. LVCF distributed \$105,000 to 22 organizations in November 2023, and looks forward to understanding the impact of this funding which has replaced Program Stream and Entry to Program Stream grants highlighted on the next page.

Throughout the year, LVCF's Assistant Director of Community Investments, **Monique Saunders Moreno** pictured below with **Mark Wilson**, Executive Director of the Zoellner Arts Center at Lehigh University, joined several different working groups and panels focused on creating awareness and advocating for a vibrant, sustainable arts, culture, and creative economy sector. A highlight was the Pennsylvania Arts & Humanities: A Statewide Convening hosted at Zoellner, for which Monique served as a Marketing Working Group member.



During 2022-23 issued grants to recipients for both **Program Stream** and **Entry to Program Stream** initiatives, both of which have been replaced by the Creative Flex Fund for 2023-24. LVCF works with the Pennsylvania Council on the Arts to distribute these grant awards

Program Stream was an invitation-only grant opportunity which provides ongoing support to arts organizations and arts programs with an established history of funding from the Pennsylvania Council on the Arts.

Entry to Program Stream was a grant opportunity which provided general operating support for small arts organizations and non-arts organizations or units of government with a history of at least one year of consistent arts programming in Pa. and average annual revenue less than \$200,000.

Both Entry to Program Stream and Program Stream grants were used for operations or programs. Grant amounts for Entry to Program Stream are estimated to be a maximum of \$2,000, while Program Stream grant amounts are estimated to be a maximum of \$3,000.

"We thank the PCA for partnering with the Community Foundation to offer this opportunity for additional small art organizations and programs to get in the PPA stream of funding," said Monique Saunders Moreno, Assistant Director of Community Investments at LVCF. "These small, but important multi-year grants can make a difference in the life of an arts organization—we are pleased to welcome these organizations into the stream."

Those organizations receiving Entry to Program Stream grants for 2022-23 include:

- Delaware Water Gap Celebration of Arts, Inc.
- East Stroudsburg University Art Department
- Fusia Dance Company
- Interlace Cultural y Desarrollo Integral Mexicano de LV
- Mock Turtle Marionette Theater
- Puertorrican Culture Preservation, Inc.
- Repertory Dance Theatre
- Ukrainian American Heritage Foundation of the Lower Anthracite Region

Those organizations receiving Program Stream grants for 2022-23 include:

- Appalachian Fiddle & Blue Grass Association
- Bach and Handel Chorale Inc
- Bethlehem Fine Arts Commission
- Bradbury-Sullivan LGBT Community Center
- Chamber Music Society of Bethlehem
- Godfrey Daniels
- Lehigh Valley Dance Exchange
- Lehigh Valley Storytelling Guild
- Mikayla's Voice
- Moravian University
- Penn State Lehigh Valley
- Pocono Bluegrass & Folk Society
- Pocono Concert Chorale
- Pocono Youth Orchestra
- SATORI
- Shawnee Institute Ltd
- SouthSide Film Institute
- The Allentown Band
- The Arts Community of Easton, Inc.
- The Camerata Singers
- WDIY 88.1 FM
- Young People's Philharmonic of the Lehigh Valley

These grants are supported by the Pennsylvania Council on the Arts, a state agency, through the Pennsylvania Partners in the Arts (PPA), its regional arts funding Partnership. State government funding comes through an annual appropriation by Pennsylvania's General Assembly and from the National Endowment for the Arts, a federal agency.



Connecting People Who Care to Causes That Matter...

Beginning in 2022, the Community Foundation embarked on a strategic journey to enhance its role as a leader in the philanthropic landscape. As part of the 2022-2055 strategic plan, which focuses on “Nurturing Place-Based Philanthropy” and “Growing as a Community Leader,” LVCF aims not only to grow in assets and influence but also to become a leader with an increased impact in the community.

To realize these goals, LVCF identified two crucial areas where external expertise was needed: Prospect Development and Messaging and Communications. In Prospect Development, LVCF seeks to engage with the right individuals, sectors, professional advisors, and networks to promote initiatives like EverGreen Funds, supporting organizations, and Impact Services. Traditional networking opportunities have shifted, making it essential to identify new avenues for engagement, especially post-pandemic.

In Messaging and Communications, LVCF faced the challenge of effectively communicating its equity-centered approach, new products, and the impact of its Foundation-directed grants and programs.

The shift from traditional grantmaking to more general operating support is a complex concept that requires clear communication. Additionally, simplifying the discussion around EverGreen Funds and Impact Services is vital to reach a broader audience.

After a thorough RFP and review process by the Foundation’s Community Relations Committee, LVCF hired Schultz & Williams (S&W), a national fundraising consulting firm based in Philadelphia, to develop a message guide and prospect sketches and strategies for engaging potential fundholders.

During the spring of 2023, S&W conducted a multitude of focus group interviews with a wide variety of LVCF’s audiences including donors, fundholders, board members, professional advisors, nonprofit and community leaders, and others. The research was used to formulate the basis for the deliverables. Once finalized, S&W consultants, **Mary Ellen Fraser** and **Gregory Wilson** (photo above) visited the LVCF Board of Governors for the Communications and Audience Engagement Project Review and training board members and staff.

Who We Are | Key Messages

A Respected Thought Leader

- Building on 55 years of knowledge and experience in regional philanthropy and embracing a more transformational role with a broader impact.
- Researching, understanding, and spotlighting key issues in our community and identifying needs and gaps in services across the regional landscape.
- Convening and connecting donors, community leaders, and organizations to share insights and work together.
- Speaking out as a champion of place-based philanthropy in the nonprofit sector—and of the Lehigh Valley—inspiring donors to make a difference close to home.
- Fulfilling a mission of value as a leader in the nonprofit sector, committed to integrity, collaboration, and innovation.

A Valued Resource to Donors

- Serving as an expert source of information and guidance regarding charitable giving.
- Delivering responsive customer service and personalized support, through a highly accessible team based right here in the Lehigh Valley.
- Providing an extensive range of fund types and options to meet a varied range of individual goals and needs.
- Creating connections between donors and nonprofits so that donors can understand the work they support and see their impact firsthand.
- Offering an attractive alternative to establishing and operating a private foundation through the EverGreen Fund.
- Sustaining personal and family legacies for generations to come, as an organization with a lasting commitment to the region and its long-term future.
- Offering a mission-driven alternative to for-profit financial services firms.

A Powerful Partner to Area Nonprofits

- Raising awareness of the work our region’s nonprofit organizations do and the far-reaching impact they have.
- Facilitating philanthropic investment on the part of cause-aligned donors.
- Connecting nonprofit leaders across the Lehigh Valley to share ideas and forge partnerships.
- Investing directly in capacity building and organizational effectiveness through initiatives like the CORE Fellowship.
- Managing Agency Funds, through which LVCF hosts and manages organizations’ endowments, freeing them from this administrative burden so they can stay mission-focused.



For Our Donors/Fundholders

We are a leader in charitable giving in the Lehigh Valley, receiving support from donors, managing funds to grow over time, and making high-impact grants to local nonprofits. We connect people like you with the causes you care about most.

Make Your Giving Local

LVCF is here to serve the Lehigh Valley and all its people. Our knowledge of local issues and organizations and our connections across the region make us a perfect choice for donors who want to make a difference right here.

Maximize Your Impact

Drawing on our deep knowledge of the region and its nonprofits, our team can help you identify organizations whose missions align most directly with your interests. We will assist you in ensuring that you make your gifts in the way that yields the greatest tax advantage and impact.

Make Your Giving Easy

Making charitable gifts can be a joy but handling the administrative details and tax implications can be complicated. For those considering starting a private foundation (or already have), we offer the EverGreen Fund an alternative that saves you the expense, effort, and complication of establishing/operating your own foundation.

Ensure Your Legacy

We are the ideal partner for donors who are also committed to long-term impact—who want their generosity to continue to do good after they are gone. We will understand your wishes and manage your funds accordingly.



LVCF and Laros Foundation Forge Philanthropic Partnership to Increase Impact

During FY23, The Helen & R.K. Laros Foundation established a philanthropic partnership with the Community Foundation to increase the impact of its grantmaking to nonprofits in the region. The Laros Foundation has transferred a portion of its grantmaking processes to the Community Foundation while maintaining its assets, staff, board of trustees, mission and grantmaking focus. The Community Foundation provides the needed operational support that enables the Laros Foundation's board and staff to focus on their mission and maximize their impact.

The aim of the Laros Foundation Board was to reduce the operational burdens experienced by private foundations. Gathering information on nonprofit organizations, processing applications for grants, and evaluating grant applications took an enormous amount of time and effort. In addition, the Laros board was rightfully concerned about the ongoing demands on staff to manage the grants process. Knowing that the Community Foundation has growing capacity as a grantmaking organization with web-based technology that simplifies the receiving, processing and evaluating applications for grants, the Laros Foundation reached out to the Community Foundation for assistance.

In the fall of 2022, the Laros Foundation Trustees approved an agreement to transition its grantmaking process to LVCF. "The Community Foundation provided us with the perfect way to focus our attention on the important grantmaking work of the Laros Foundation," said **Sharon Zondag**, Executive Director of the Laros Foundation (below). "We took advantage of the exquisite capacity of the Community Foundation and immediately increased our ability to improve our service to the community. Because the Community Foundation works closely with the nonprofit community of the Lehigh Valley, our grant applicants were already familiar with the application portal at the Community Foundation."



The partnership has proven very successful for both parties. "We knew we can expand our footprint of service to the Lehigh Valley community, and we felt strongly that we could provide exactly what the Laros Foundation needed," said **Erika Riddle Petrozelli**, CPA, CAP®, President and CEO of the Community Foundation. "When a private foundation engages our Impact Services, it not only frees itself from many time-consuming critical functions, it also provides insurance against staff turnover."

About the Helen & R.K. Laros Foundation

The Laros Foundation has been committed to supporting the community of Bethlehem since its founding in 1952. Helen & R.K. Laros believed in engaging and connecting with the people and organizations of Bethlehem to be a part of building a stronger, more resilient society. Fundamental to this commitment is the value the Foundation places on inclusion, diversity, equity, and access for all in the organizations and communities it serves.



Grants have supported the Community Action (Committee) of the LV since 1985 and were part of the initiative to build SteelStacks and the Banana Factory, the ongoing maintenance of the Salvation Army & the expansion of New Bethany Ministries mission with housing and a food-bank, Touchstone Theatre since its earliest days in 1979 for construction costs, and Northampton Community College to build the Fowler Campus, and of course so much more. Since its inception in 1952, the R.K. Laros Foundation has granted nearly \$9 million to nonprofits in the community.



Impact Services for Private Foundations

By partnering with LVCF Impact Services, private foundations benefit from a streamlined grant cycle process. Grant applications come through our portal (of which most local nonprofits are also familiar), evaluators log-in to read and score applications, LVCF interprets the evaluation data and provides a report, and the trustees decide where and how much to send. Your private foundation retains legal ownership of its assets and maintains its own governing body while LVCF takes care of most of the work. *It's the best of both worlds!*

EverGreen Fund at LVCF

EverGreen Fund at LVCF provides a comprehensive suite of services including fiduciary oversight, IRS filings, financial audits, check writing, bookkeeping, and investment management. An EverGreen Fund allows donors to reduce the burdens, facilitate effective grantmaking, and ensure impactful philanthropy, supported by expert advice, network opportunities, and tailored grantmaking support.



Private foundations can access LVCF's Impact Services option and procure only the assistance needed, based on an annual fee-for-service and a one-time set-up fee. Contact Carrie Nedick, CAP® Director of Donor Services: carrie@lvcfoundation.org

BOARD OF GOVERNORS



Welcome New Members

The Board of Governors at Lehigh Valley Community Foundation provide administrative, programmatic, and fiscal oversight in support of the organization's mission. Members of the Board serve as ambassadors, promoting the Community Foundation as a vehicle for philanthropy and a leader of community improvement. During the year, LVCF welcomed three new board members, Tom Neuhaus, Marvin Webb, and Leigh Ehrlich and said thank you and farewell to Melinda Stumpf.

Tom Neuhaus

Tom Neuhaus, MBA, Vice President at Victaulic Company in Easton, Pa., joined the Board of Governors in July 2022. Tom serves on the LVCF's Finance Committee.

Tom has over 34 years of experience in various functions in industries ranging from industrial and commercial equipment manufacturing, energy, large-scale municipal power generation and distribution and building products. Companies he's worked for over his career range from small, privately held entities to Fortune 50 multi-national public corporations. Prior to joining Community Foundation's Board, Tom served on the Board of Directors for the Cancer Support Community of Greater Lehigh Valley for the past 6 years. He holds a mechanical engineering degree from Syracuse University and an MBA from the University of Rochester.



Marvin Webb

Marvin Webb, MBA, former Chief Financial Officer (CFO) at Funders for LGBTQ Issues in New York City joined the Board of Governors in July 2022. He serves on LVCF's Community Investments Committee.

Marvin serves on CenterLink, the board of 200+ LGBT community centers. He moved to New York City in 1989 to begin his 17-year career as a professional modern dancer. After retiring from dance, he was the Human Resources & Business Manager of a boutique public relations firm in New York City. Marvin received a BA degree from Creighton University, a Certificate in modern dance from the Martha Graham School of Contemporary Dance, and a MFA degree, in contemporary dance, from NYU/Tisch School of the Arts. After his performing career, Webb received a MBA degree in HR and Marketing from Baruch College/Zicklin School of Business. He graduated from Southern New Hampshire University with an MS in Accountancy.



Leigh Ehrlich

Leigh Ehrlich, CPA, CHFP, MBA, joined the Board of Governors in January 2023. Leigh is Executive Vice President and Chief Financial Officer for Main Line Health where she is responsible for all financial and treasury matters for Main Line Health's operations and subsidiaries.

A health care finance veteran, Leigh joined Main Line Health following nine years with Lehigh Valley Health Network, where she served as senior vice president and CFO for hospital operations.

Leigh is a certified public accountant and certified health care financial professional who holds an MBA from Lehigh University and a bachelor's degree in management and accounting from East Stroudsburg University.



Thank You Melinda

LVCF said farewell and thank you to Melinda Stumpf for her years of service on the Board of Governors from 2014 to 2023. During her tenure, Melinda served on the Discretionary Grants Committee, Community Relations Committee, and Board Affairs Committee. Her unique insight and support have contributed greatly to the Foundation's equity journey. We thank Melinda for her service to the Foundation and for her commitment to improving the quality of life in the Lehigh Valley.





Board of Associates Fall 2022 Meeting

Trust-Based Approach to Philanthropy

The Fall 2022 meeting, titled Integrating a **Trust-Based Approach to Philanthropy** was held on Tuesday, October 11, 2022, at Homewood Suites in Center Valley, Pa. **Cindy Lambert**, Chair, LVCF Board of Associates welcomed the group. She was followed by **Erika Riddle Petrozelli, CPA, CAP®**, President and CEO, who provided an update on LVCF activities.

With a core set of values rooted in advancing equity, shifting power, and building mutually accountable relationships, trust-based philanthropy seeks to demonstrate humility and collaboration in what we do and how we show-up in all aspects of our work as grantmakers.

LVCF has been integrating trust-based philanthropy for the past few years and we see transformational change occurring in our community. We want our partners, friends, and leaders in this work, to understand the impact of this shift and have conversations with us about trust-based philanthropy.

During the program, LVCF’s **Megan Briggs**, Vice President for Community Investments (below left) and **Monique Saunders Moreno**, Assistant Director of Community Investments (below right), moderated a panel discussion that provided both a national and local perspective on this trend in grantmaking. The panel included: **Yamelisa Taveras**, Founder; Unidos, Inc., (above left); **Marc Rittle**, Executive Director, New Bethany (center); and **Molly Schultz Hafid**, Executive Director, Butler Family Fund (left), from Washington D.C., who provided an national perspective.



Spring 2023 Meeting
Top Ten Charitable Trends

The spring 2023 meeting of the LVCF Board of Associates was held on May 18, 2023 at Homewood Suites in Center Valley. **Cindy Lambert**, Chair of the LVCF Board of Associates, presided over her last meeting as chair and welcomed the group of over 60 people. **Erika Riddle Petrozelli, CPA, CAP®**, LVCF President and CEO provided an update on LVCF activities in support of the Foundation’s strategic plan.

Nationally acclaimed speaker **Bryan Clontz** PhD, CFP®, CLU®, ChFC®, CAP®, AEP®, RICP®, CBP, ChSNC®, Founder & President, Charitable Solutions, LLC presented, “**Top 10 Charitable Trends Everyone Should Know in 2023.**” Bryan is the founder and president of Charitable Solutions, LLC, specializing in non-cash asset receipt and liquidation, gift annuity reinsurance brokerage, actuarial gift annuity risk management consulting, emergency assistance funds, as well as virtual currency and life insurance appraisals/audits. He also serves as Senior Partner of Ekstrom Alley Clontz & Associates—a community foundation consulting firm in Tuscon, Arizona.

The Board of Associates are members of an important group of foundation donors, professional advisors, government representatives, nonprofit leaders, corporate executives, and community volunteers who share an interest in the work of the Foundation.

- executive committee
- The Board of Associates is led by an executive committee (as of July 2023):
- Linda Sheftel, Chair**
Justin Sheftel Memorial Fund
 - Alan Abraham**
Retired (Concannon Miller)
 - Patricia Beldon**
Community Representative
 - Kathryn Brown**
Morton Brown Family Wealth
 - Dawn Godshall**
Community Action Lehigh Valley
 - Michael Tukeva**
Pocono Mountains United Way



PROGRAM HIGHLIGHTS



Data Collection Workshop for Nonprofits | Building Capacity

In January of 2023, LVCF and the Volunteer Center of the Lehigh Valley partnered to hold a workshop: **Building Your Organizational Capacity to Collect and Effectively Use Demographic Data** during January, 2023, at The Crayola Gallery inside the Banana Factory in Bethlehem. The program, attended by nearly 100 nonprofit staffers and others, explored industry trends and best practices in the collection of demographic data and how to implement a data collection strategy that aligns with organizational needs and translates to organization’s Candid profile. (above left) **Megan Briggs**, LVCF Vice President of Community Investments introduces the workshop presenters **Amy Lippincott**, Senior Support Specialist for Evaluation & Learning (center) and **Beth Cain**, consultant for Evaluation & Learning (right), and from the tcc group. LVCF’s **Erika Riddle Petrozelli** (below center) and VCLV’s CEO **Karen Smith** welcomed the group. The series started with Session #1 is “Start Telling Your Story with Your Candid Profile” (virtual).



AFP Spring Philanthropy Institute

Two LVCF staff members presented at the Association of Fundraising Professionals, Lehigh Valley Chapter (AFP) 2023 Philanthropy Institute. The one-day program brings industry experts and nonprofit leaders and volunteers together for a day of learning best practices in fundraising, innovation, research, and career development.

Carrie Krug Nedick, CAP®, LVCF Director of Donor Services, presented **Demystifying Donors’ Motivations**, focusing on donors who have taken the step to establish a charitable fund, their incentive for doing so, the rationale behind a charitable fund, and what it means to work with these types of donors.



Erika Riddle Petrozelli, CPA, CAP®, LVCF President and CEO, and **Stephen Link**, Director of Philanthropic Services at Cornerstone Advisors, presented **Your Seat at the Table: The Chartered Advisor in Philanthropy**. The session was for fundraising professionals to become familiar with the value of continuing their fundraising education by earning the Chartered Advisor in Philanthropy® (CAP®) designation. The duo outlined the CAP academic content and discussed the benefits of participating in the Lehigh Valley CAP Study Group.



Nonprofit Virtual Tours

LVCF invited fundholders, donors, and others to visit five nonprofit organizations virtually via Zoom in 2022-23. During each visit, we heard from the organization’s leaders and learned more about their mission, successes and challenges. [Learn more...](#)



OUT & ABOUT



LVCF and the Estate Planning Council - Lehigh Valley co-sponsored a program, "Introduction to ESG Investing | Diversity Considerations in Investing." LVCF's Erika Riddle Petrozelli CPA, CAP®, President and CEO and Chair of the EPCLV in 2023 (above) introduced the PFM Asset Management



LLC team of Bikram Chadha Director Endowment & Foundation Specialist; John Spagnola Managing Director Co-Head (right), Outsourced CIO Practice; and Surya Pisapati, CFA, Director Head of Global Equities (left). The program was held in October of 2022. See all the photos <https://flic.kr/s/aHBqjAc8fq>



LVCF's Erika Riddle Petrozelli, CPA, CAP®, (right) presided over the Estate Planning Council Lehigh Valley's annual meeting in May 2023 SteelStacks that included a workshop by Bryan Clontz, Ph.D., CFP, CAP®, (left) "Creative Charitable Planning with Noncash Assets." Erika passed the EPCLV leadership role to Tammie L. Yearwood, CPA, and now serves as immediate past president. See the photos on [Flickr](#).



Thank you to WFMZ 69 News for shining some light on the importance of Giving Tuesday which supports the nonprofit sector through unrestricted, general operating funds. "This type of donation supports your favorite organization by keeping the lights on, paying their hard-working staff salaries, and giving the flexible



funds to innovate," said LVCF's Monique Saunders Moreno, LVCF's Assistant Director of Community Investments who contributed to the segment along with our fellow nonprofit partners Community Bike Works and the United Way of the Greater Lehigh Valley. See the story online at: <https://bit.ly/3GXFITQ>



Carrie Krug Nedick, CAP®, LVCF's Director of Donor Services (left) and Board Member Luis Campos, Easton City Administrator (right) visited the Easton Rotary Club in March of 2023 to talk about the Community Foundation, and a new fund being established at LVCF by the City of Easton that will help fund youth sports in the City. Carrie discussed LVCF's structure, mission, goals, and grantmaking. [See the photos.](#)



It was a great night at the FREDDY© awards in 2023 at the State Theatre in Easton. LVCF's Erika Riddle Petrozelli presented the award for best ensemble. See the video of the award to see which school received the award on WFMZ's website at: <https://tinyurl.com/4exenhu8> LVCF was proud to sponsor the



event again this year that celebrates the many talented students and promotes the arts in the Lehigh Valley. The FREDDY© awards recognizes exceptional talent, hard work and dedication within the local high schools performing arts. More than 30 schools put on spring shows and musicals that participate in the program.



LVCF's **Monique Saunders Moreno**, Assistant Director of Community Investments, presented on LVCF's partnership with the Pennsylvania Council on the Arts (PCA) at a program in March 2023 held to discuss Arts In Education & Pennsylvania Partners in the Arts programming. The meeting held at ArtsQuest was an opportunity for people to learn about grants and support for small businesses in the creative industries, flexible funding for nonprofit arts programs and/or arts services, and facilitating artist residencies.

Staff members (**Michael Wilson**, **Erika Riddle Petrozelli**, **Carrie Krug Nedick**, & **Holly Fitzpatrick**, l. to r.) at the first annual Pennsylvania Community Foundation Association (PACFA) conference in Happy Valley for a great day of learning and collaboration. PACFA is a network of 30+ community foundations, working to enhance the quality of life in the regions they serve by growing permanent endowment funds, through creative and thoughtful grantmaking, tailored donor education and through dynamic community leadership partnerships.



LVCF's **Monique Saunders Moreno**, Assistant Director of Community Investments, spoke at the 2023 Women's Business Council's program session, Amplify Voices for a Diverse and Inclusive Culture in the Workplace. She was part of a panel that shared their experiences and challenges with this timely, crucial issues: providing employees safe spaces; offering adequate services; hiring staff, or removing names from buildings because of racist behavior. Monique (m.) caught up with LVCF's **Megan Briggs** (l.) and **Trisha Higgins** (r.) after her presentation.

LVCF's Director of Community Investment's **Megan Briggs** (m.) participated in a panel discussion titled "Traveling While Black: Co-Pilots & Co-Conspirators" held in March 2023 at the Community Church in Allentown. In this conversation about the intersection between standing by and standing up. Also on the panel are **Lee Butz** (Chairman of the Board of Alvin H. Butz, Inc.), **Marci Ronald-Lesko** (United Way) pictured on the left, **Michael J. Seiden**, and **Annie Balles** (Lehigh student); with opening remarks provided by **Laurie Hackett** (Air Products).



LVCF STAFF UPDATE

Promotions Reflect Growing Expertise and Leadership

The Lehigh Valley Community Foundation (LVCF) promoted three staff members as of July 1, 2023 in recognition of their professional growth, increasing expertise, and demonstrated commitment and leadership in advancing the Foundation's work.



Trisha Higgins, CPA, was promoted to the position of Executive Vice President and Chief Financial Officer, elevating her from her previous role as Vice President and CFO. With over 20 years of dedicated service since joining in 2002, Trisha oversees all aspects of the Foundation's financial and operational administration.

Megan Briggs was named Vice President of Community Investments, a promotion from her previous role as Director of Community Investments. In her new role, she is responsible for overseeing grantmaking administration and strategy as well as the organization's community leadership work, a key initiative of LVCF's strategic plan. She collaborates with volunteer advisory committees to implement the Foundation's high-impact grantmaking programs and analyzes data from the nonprofit community to maximize and promote community impact.



Holly Fitzpatrick, who joined the LVCF staff in March of 2022, was promoted to the position of Grants Manager from her previous role as Grants Administrator. The promotion acknowledges her elevated role in the grants process and for taking ownership of these processes and earning the trust of fundholders, nonprofits, and fellow staff members.

Staff Attain Chartered Advisor in Philanthropy (CAP®) designation

LVCF's **Erika Riddle Petrozelli**, President and CEO, and **Carrie Krug Nedick**, Director of Donors Services, attained the Chartered Advisor in Philanthropy® (CAP®) designation. The CAP® credential is for financial and nonprofit professionals specializing in philanthropic planning strategies. CAP® designees master financial details and essential interpersonal skills to guide clients and donors toward positive social impact.

The Community Foundation in partnership with Cornerstone Advisors Asset Management co-hosted a study group for a number of advisors and nonprofit professionals pursuing The Chartered Advisor in Philanthropy® (CAP®) designation. The partnership represents a three-year commitment to help prepare area advisors for testing by the American College of Financial Services to achieve the CAP credential. The study group was the brainchild of Stephen P. Link, Director of Philanthropic Services, Cornerstone Advisors Asset Management, who was a member of the first study group along with Erika and others. Carrie participated in the second year of the study group. [Learn more...](#)



New Part-Time Staff Provide Needed Support

LVCF welcomed **Maureen Connolley Wendling** as the part-time Director of Donor Initiatives in 2023, enhancing the Foundation's overall fund development and fundraising efforts with a specific focus on family legacy and philanthropy. Maureen's primary responsibilities include donor identification, cultivation, and solicitation.



Amy Sams joined the Community Foundation staff in January 2023. She serves as part-time Gifts Coordinator with primary responsibility to assist the Donor Services function in processing all charitable gift transactions, maintaining donor profiles and related information, and reporting on such gifts and profiles.



Jihan Solomon joined the LVCF staff in December 2022. As Business Administrator, Jihan provides support for the Chief Executive Officer, Board, and Finance Department. In addition, she is also responsible for Business Office Operations.



To learn more about the staff at the Community Foundation, visit the LVCF staff webpage.

Charitable Funds

291
As of 6/30/23

Lehigh Valley Community Foundation houses a variety of funds to meet the philanthropic needs of its donors, fundholders, and the community, which include:

- Agency Funds
- Area-of-Interest Funds
- Community Investment Funds
- Community Endowment Funds
- Designated Funds
- Donor-Advised Funds
- Geographic Affiliate Funds
- Scholarship & Award 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.

- Allentown Band, Inc. Endowment Fund
- Allentown Symphony Association Funds
 - Allentown Symphony Association Endowment Fund
 - William J. Fenza Memorial Fund
- Bach Choir of Bethlehem Funds
 - General Endowment | Charles & Louise Hoffman Fund
- Bethlehem AAUW Fund
- Boys & Girls Club of Bethlehem Restricted Endowment #2
- Bradbury-Sullivan LGBT Community Center Fund
- Burnside Plantation Fund
- Bucks County Free Library Endowment Fund
- City of Easton Sports & Recreation Fund (See the Story on Page 27)
- Family Connection of Easton Fund
- Junior League of the Lehigh Valley Agency Endowment Fund
- Latino Leadership Alliance Scholarship Fund
- Lehigh Valley Child Care Endowment Fund
- Lower Macungie Township Fund
- Hunter Meckes Memorial Scholarship Fund
- Endowment Fund of Meals on Wheels of The Greater Lehigh Valley
- New Bethany Ministries Endowment Funds:
 - General Endowment | Robinson Fund | Quasi-Endowment Fund
- Pediatric Cancer Foundation of the Lehigh Valley Fund
- David Rabaut United Way Fund for Neighborhoods
- ShareCare Fund
- Sights for Hope Endowment Fund
- United Way of the Greater Lehigh Valley Funds
 - General Endowment | The Thun Fund
- Endowment Fund to Further the Mission of Valley Youth House
- Victory House of Lehigh Valley Endowment Fund
- WDIY Public Radio Fund
- WDIY Endowment Fund



Fund Spotlight

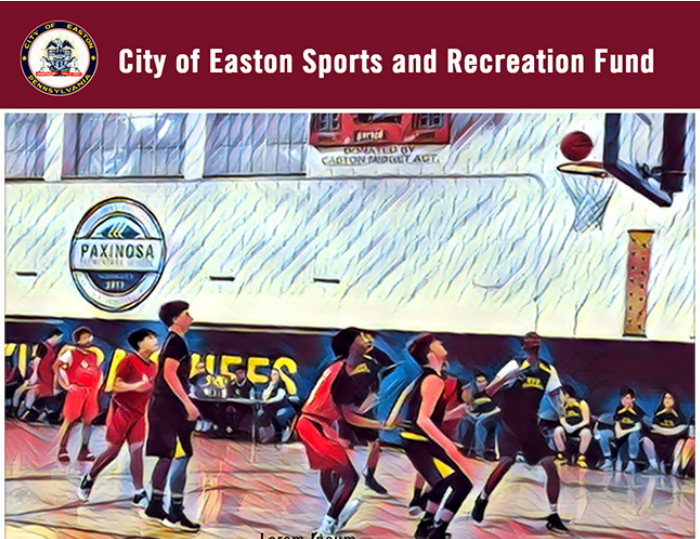
City of Easton's Agency Fund at LVCF Supports Recreational Programs

During the spring of 2023, the City of Easton established an agency fund at the Lehigh Valley Community Foundation to benefit the Easton Recreation Department for youth sports programming. The Fund enable individuals and companies to donate in support of programs, such as the new AAU Boys Basketball Program, which is benefiting Easton residents.

The donated funds are also be used in the creation of future talent-developing programs in the city's Recreation Department. Donors have the option to designate funds to the specific program of their choice. Funds support the purchase of team uniforms, facility rentals, equipment, and participation fees in an effort to reduce cost for city residents who may not be able to afford similar opportunities only offered in suburbia.

"This fund allows us to expand recreational programming by introducing new programs that support talent development," said City Administrator **Luis Campos** who serves on LVCF's Board of Governors. "I've had many discussions with community and business leaders who would like to financially support the city's Recreation Department's programs so that they can expand, but until now they didn't have a way to do so."

Mayor Sal Panto. Jr. recognizes the impact of athletics on youth, "Our community programs develop much more than sports skills. They teach players how to be a member of a team where they contribute to a larger goal that benefits everyone involved. Donors to this fund are empowering our youth through athletics."



"We are so pleased to partner with the City of Easton and play a role in supporting the residents through the development of this important charitable fund at the Community Foundation," said **Erika Riddle Petrozelli, CPA, CAP®**, President and CEO of LVCF. "This fund will enable a wide variety of interested parties to lend their support to enhancing opportunities for Easton area youth to benefit from organized activities."

LVCF assists community organizations with their charitable activities by setting up funds to allow donations to be made by companies and individuals. LVCF then acts as the homebase for the funds, collecting and providing them to the organizations for their stated purposes. Make a donation to the Fund.



News conference announcing the establishment of the fund

Charitable Funds

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

An area-of-interest fund supports programs & initiatives that tackle issues of the donors’ choosing such as the environment, camperships, youth and families, and many others.

Foundation-directed area-of-interest funds awards grants based on LVCF’s own community research to identify charitable programs in the specified area-of-interest

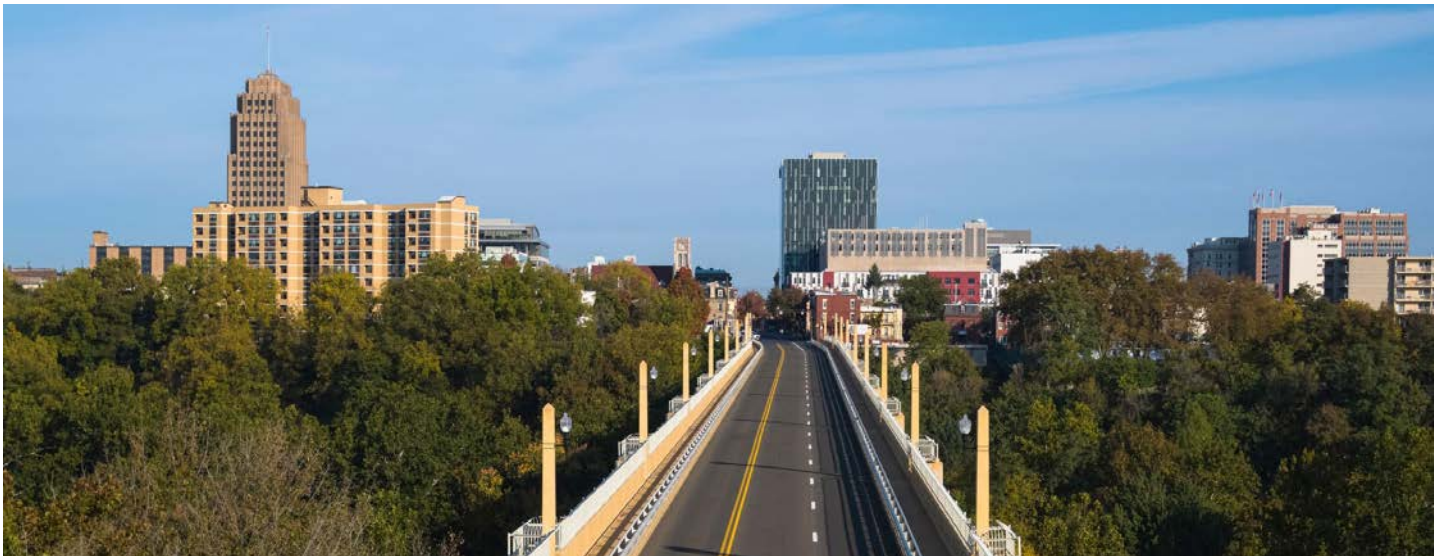
Donor-directed area-of-interest funds awards grants based on the recommendations of a community committee that oversees a specific initiative.

Foundation-directed area-of-interest funds

- Frances L. Barnard Fund for Children
- Walter & Alma Bastian Fund
- Barbara & Maxwell Davison Fund for Alzheimer’s Care
- The Edward & Inez Donley Fund
- Richard E. Gasser Fund
- Barry M. Kessler Endowment Fund for Basic Human Needs
- Lehigh River Fund
- Erwin J. & Gertrude K. Neusch Fund
- Janis & Paul Gross Fund for Youth and Families
- Outdoor Recreation Fund for Youth
- Robert D. & Gwendolyn-Jane Romeril Campership Fund
- Margaret Haas Rotunno Memorial Fund for Local No Kill Shelters
- William C. Rybak Fund for Persons with Disabilities
- Leonard A. Wenzel Memorial Fund for South Bethlehem
- Gene & Joan Witiak Fund

Donor-directed area-of-interest funds

- Any Given Child Bethlehem Fund
- City of Bethlehem Celebration Fund
- Downtown Allentown Community Development Initiative
- Every 15 Minutes Fund
- The Galaxy Fund
- Lehigh Valley Coalition for Kids Fund
- Lehigh County Medical Society Education Fund
- Lehigh Valley Homeless Veterans Fund
- Northampton County Bar Association Charitable Fund
- PPL Operation HELP Fund
- Saucon Sanctuary Fund



Fund Spotlight



Nurturing Success at Raub Middle School through WE Thrive

The First Commonwealth WE Thrive LV Foundation Fund, a donor-advised fund at LVCF, is used to support the power of a diverse and inclusive community and enhance the quality of life for people throughout the Greater Lehigh Valley. The Fund currently supports a financial wellness initiative that benefits students and families of Raub Middle School, located in the heart of Allentown.

Enabling Future Leaders | Over a three-year period, First Commonwealth has committed \$100,000 to Raub. This funding supports beneficial initiatives such as Financial Wellness Education, the school store, 8th-grade graduation ceremonies, and the annual Spring Prom Dance, ensuring a positive impact on the school community.

Financial Wisdom for Students | WE Thrive has a team of 41 Financial Wellness Counselors. These counselors run a unique program for 6th graders called the “Money Club.” This after-school club isn’t about lectures or testing but is rather a fun way for kids to learn about handling money. The goal is to offer financially relevant tools to support better decision-making now and in the future. All programs are offered in English and Spanish to ensure all participants feel welcome to join.

Family-Focused Workshops | Beyond school, WE Thrive makes every effort to go the extra mile. The same 41 counselors hold evening workshops for parents. They cover practical topics like making a budget that works, saving and investing, credit repair and health, and how to plan for and make major purchases. These workshops strive to help parents feel more confident about their finances and enable them to become valuable resources for their children moving forward.

A Light for the Community | WE Thrive doesn’t merely function as a program; instead, it serves as a source of support and prosperity for Raub Middle School and similar organizations. By putting money directly where it matters, students and their families can take control of their financial futures. It’s about creating a community where everyone has the tools to succeed.

Both First Commonwealth and the WE Thrive LV Community Foundation are thrilled to support Raub Elementary’s dreams and hope to create a lasting effect on financial literacy. [Learn more....](#)

Charitable Funds

Community Investment Funds | Meeting Changing Needs

Community Investment Funds for discretionary grantmaking 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.

- 250th Book Fund
- E. Spencer & Nellie C. Addison Fund
- Margaret Ann Bachert Fund
- Randy H. & Ramona A. Bruch Fund
- John L. Daniel & Carol Daniel-Holben Fund
- Lucille F. Driver Fund
- Donald & Alice Farquharson Fund
- Ben Franklin Trust Fund
- 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
- The Pine Fund
- Anthony J. Ruggiero Fund
- Michael C. Schrader Fund

Designated Funds | Defining Your Giving

Donors name specific nonprofits to receive grants, and LVCF will make those grants over time. It is the most common way to preserve an individual’s charitable legacy.

- William B. & Elizabeth Behr Agocs Geophysical Research Fund
- Allentown Symphony Association Fund (established by the Century Fund)
- American Red Cross – Lehigh Valley Chapter Fund
- Clayton W. & Helen H. Bernhardt/V.J. Pazzetti, Jr. Fund
- Benjamin C. Boylston-Kemerer Museum Fund
- Benjamin C. & Eleanor A. Boylston Fund for the Lehigh Valley Chapter, American Red Cross
- H. Bridges & Lucile P. Boylston Fund
- Boys & Girls Club of Bethlehem Restricted Endowment #1
- Center for Faith & Justice Fund
- Camp Compass Fund
- Patrick J. & Christine Connell Fund
- Marjorie S. & Joseph E. Correll Fund
- John L. Daniel and Carol Holben-Daniel 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
- Tore & Charlotte Hartmann-Hansen Fund for the Bethlehem Morning Star Rotary Charitable Organization
- Lifepath Employee Award Fund
- Luther J. Hottle Fund
- Nancy S. & Charles E. Keenan Endowment Fund
- Kenneth & Elizabeth Kressler Fund
- Deborah A. Libricz Memorial Fund
- Link Designated Family Fund
- Magee Family Fund
- Charles & Ruth Marcon United Way Fund
- Mary & Jack McNairy Fund
- Dr. Russell E. Morgan, Sr. Fund
- Peter Pagotto, Elizabeth A. Pagotto, and Family Fund
- Delphine Quinn Perpetual Fund
- Raymond-Cryder Designated Fund
- Albert M. Reed Fund
- Safe Start Fund
- Arthur E. Schaeffer Trust Fund
- Shoemaker-Bond Home Association, Inc. Fund
- Theatre Organ Arts Fund
- Thun Fund
- George T. Walker Charitable Fund
- Warren W. York Fund To Benefit the United Way of the Greater Lehigh Valley

Charitable Funds

Donor-Advised Funds | Remaining Deeply Involved in Your Giving

A donor-advised fund permits donors to recommend grants from their fund and to vary those recommendations and change their charitable priorities as they wish. LVCF offers personalized service and deep community knowledge – a true partner in philanthropy.

- Michael & Lynn Abgott Fund
- The AEP Fund
- Alan & Marsha Abraham Fund
- Arbor Insurance Group Community Fund
- Avalon Fund
- Stephen and Janis Bajan Charitable Fund
- Barnette Fund
- Peter Barter and Linda Bartera Fund
- Bethlehem Rotary Club Fund
- Eric B. & Denise M. Blew Fund
- The Brown Family Care Fund
- Borda Family Fund
- Geoff & Wenda Boyer Fund
- Buckno Lisicky Charitable Fund
- Building Fund
- Burdette Family Fund
- Dr. Lisa S. Bunin Foundation Fund
- Ian & Patty Carlis Fund
- Mike Caruso Foundation Fund
- Geoff Chenworth Memorial Fund
- Cinquino Community Fund
- Client 1st Foundation Fund
- Karen & Peter Cooper Fund
- Cornerstone Cares Fund
- Peg DeAngelo Memorial Fund
- Anthony Michael Durman Foundation Fund
- Grace Kathryn & Jeffrey P. Feather Fund
- Ferrio Fund
- Trisha & John Fistner Giving Fund
- W. Beall & Marlene O. Fowler Fund
- Beall Fowler Family Fund
- Fred Fund
- Gadomski Foundation Fund
- Denise C. Garrity/Compass Point Foundation Fund
- Stephen & Joyce Gehringer Charitable Family Fund
- Grifo Family Fund
- Dolly Haltzman Foundation for the Arts Fund
- Thomas Hartzell & Jean Larkin Fund
- Heydt Family Fund
- Ray & Donna Holton Charitable Fund
- Hutchinson 3-H Fund
- Fleming Foundation Fund
- Joan A. Kraft & R. Wayne Kraft Memorial Fund
- William and Constance Kreitz Fund
- Link Family Donor Advised Fund
- Lucky7 Fund
- Lyons-Shields Fund
- Steven W. Kraft and Margot R. K. Hillman Fund
- William & Carol Kreitz Fund
- Kressler, Wolff & Miller Fund
- Sylvia Fenstermacher Lawler Foundation for the Arts Fund
- Lehigh County Lawyers’ Charitable Fund
- Robert H. & Jean C. Littner Fund
- MAK Fund
- L. Charles & Ruth H. Marcon Fund
- Dr. Richard D. Martin Memorial Fund
- John C. McGuire Memorial Fund
- McNairy Fund
- Cindy Miles Adaptive Fund (see page 32)
- The Morton Brown Family Wealth Fund
- Mulligan Family Fund
- myHR Partner, Inc. Fund
- Nanovic Family Fund
- Olexa Family Foundation Fund
- David and Carol Osborn Family Fund
- Chris and Pam Page Charitable Fund
- Tyler and Jenna Papaz Fund
- Ronald R. Perin Fund
- Angela René Pessina Foundation Fund
- Matthew & Erika Petrozelli Fund
- Pharo Family Fund
- ack Pressmann Memorial Fund
- Lynn Ratzell Fund
- Raymond–Cryder Donor Advised Fund
- Patrick J. Reid Fund
- John G. Reilly Fund
- Reilly-Taykowski Family Fund
- Tricia B. Reilly Fund
- Jonathan Ringer Foundation Fund
- Bonnie & Joel Ronco Fund
- St. Luke’s Hospital Medical Staff Fund



The Cindy Miles Adaptive Fund at LVCF serves as an example of how the Community Foundation makes charitable giving easy, impactful, and local, while building a legacy

In spring of 2023, **Kristy Miles Valladares**, who learned of LVCF through **Beth Boyer**, a former Community Foundation board member, called the Foundation asking about a fund. Her mother Cindy only had a few days to live, and they couldn’t wait any longer to find a way to accept donations in her memory. Cindy was well-loved, and so full of life; her family knew there would be many family, friends and colleagues wanting to contribute in her honor. Within a few days the [Cindy Miles Adaptive Fund](#) was established at the Community Foundation.

In the year since the fund was established, Cindy’s family has raised \$40,000 through 228 individual donations and counting. In their partnership

with the Community Foundation, they found a community of people who want to make a difference with philanthropy. By entrusting the fund to the Foundation, they could focus their efforts on fulfilling Cindy’s mission: Fun and fitness for all abilities through active play.

But this story is really about Cindy, a doctor and beloved community member in the Lehigh Valley. Cindy was a pediatric clinical specialist in physical therapy and a world-renowned expert in torticollis. Her daughter, Kristy, fondly recalls her mother’s commitment to making fitness not just accessible but enjoyable for everyone. Cindy always said “Fitness should be fun!”

As a doctor, teacher, and advocate, she touched countless lives, particularly in the field of physical therapy. She treated children through her physical therapy practice, presented at international conferences, and even delivered wheelchairs to distant corners of the globe. [Learn more about Cindy’s life.](#)

She believed in big ideas, in the power of community, and in the simple joys of watching children play. In November 2021, as the family began to process Cindy’s diagnosis, they asked, “How would you like to be remembered?” and Cindy said “Well, I think I’d like to have a park named after me.”

The first goal of the Cindy Miles Adaptive Fund is to build an adaptive playground in the Whitehall-Coplay Area. Kristy can imagine herself sitting on a bench in that park here in the Lehigh Valley, watching families of all socio-economic backgrounds and children of all abilities playing together in celebration of her mom. “LVCF offered the simplest path to offer a way to raise money without the challenges of obtaining our own 501c3 status,” she noted. “Working with the Community Foundation was easy and efficient in our time of grief that we knew we truly had a partner in this venture.”

The mission of the Cindy Miles Adaptive Fund is clear: to spread joy and fitness to all, regardless of ability, through inclusive play. In the future, Kristy would like to expand the fund, possibly endowing it, and offering grants to organizations that make fitness and play accessible to all.



An adaptive playground features a unique surface that allows for wheelchairs and other equipment to easily move across the grounds and access the play areas.

The playground allows for inclusive play with equipment designed specifically for different abilities, kids have the opportunity to grow and develop through physical activity, imagination, and a sense of freedom and belonging.

Donor-Advised Funds (continued)

- Justin Sheftel Memorial Fund
- Star Foundation Fund
- Stershic Family Fund
- The Stinner Family Fund
- Glenn M. Taggart Family Foundation Fund
- Jack & Ann Follett-Terres Fund for Compassionate Care
- The Torrey Family Fund
- Donald H. & Mary R. Trautlein Fund
- Two Tunics Fund
- Tuskes Fund
- Charles Versaggi Future Fund
- John & Chrissie Wagner Fund
- Weigard Family Fund
- First Commonwealth FCU WE Thrive® LV Foundation Fund (See Story on page 29)
- Wombat Fund
- Betty & Scotty Wood Memorial Fund
- Ilene & Robert Wood Striving to Make a Difference Fund
- Stella C. Yee Memorial Fund
- James and Naomi Yervey Fund
- Yeoman Family Fund
- Ryan J. Zawada Memorial Fund

Geographic Affiliate Fund | Serving Surrounding Areas

A geographic affiliate fund serves a defined geographic region that is near, but not in, LVCF’s primary service area. The affiliate organizes its own advisory committee and establishes its own priorities. The committee makes recommendations for the grants that will come from the local discretionary funds.

- Upper Bucks Community Foundation Fund
 - Bucks County Free Library Endowment Fund
 - Nancy S. & Charles E. Keenan Endowment Fund

Scholarship & Award Funds | Further Education

These funds allow donors to invest in the future by helping deserving students pursue higher education. Students benefit from the financial assistance as well as the academic recognition of being a scholarship recipient.

- Elizabeth Behr Agocs Scholarship Fund
- Ann C. Bernard Memorial Scholarship Fund
- Bethlehem Educational Scholastic Trust (B.E.S.T.) Fund
- Bethlehem & Morning Star Rotary Clubs Scholarship Fund in Remembrance of Stephen P. Godbolt
- Debra “Frau” Brown Memorial Scholarship Fund
- Buckno Lisicky Scholarship Fund
- Andrew Budraitis Foundation Scholarship Fund
- Reverend Douglas Caldwell Fund for Nursing Excellence
- Truman L. Frey, Jr. Scholarship Fund
- Beall Fowler Scholarship Fund for Northampton Community College
- Frederick W. Hahn Scholarship Fund
- Hanover Township Memorial Golf Tournament Scholarship Fund
- Carol (Rodgers) Jaffe & Donald Jaffe Scholarship Fund
- Gary D. Martz Class of 1974 Scholarship Fund
- Damian C. Mele Scholarship Fund
- Stephanie Olexa and Seth Weber Scholarship Fund
- Parkland High School Class of 1961 Scholarship Fund
- Miss Pennsylvania Scholarship Fund
- Dr. Joseph A. Perna & Hilda Ramos Perna Memorial Scholarship Fund
- William and Jamie Soukup Reid Memorial Scholarship Fund
- Francis Sadler Award Fund
- Arthur E. & Myrl G. Schaeffer Scholarship Fund
- Anthony Severo Memorial Scholarship Fund
- Justin Sheftel Scholarship Fund
- Bob Swick Memorial Scholarship Fund
- Catherine Hilaire Thompson Nursing Scholarship Fund
- Sue Ratzell Scholarship Fund for Nursing
- Tuskes Family Scholarship Fund
- Edwin F. Van Billiard Scholarship Fund
- Betty Williams Memorial Scholarship Fund
- Wilson High School 2006 Football Champions Scholarship Fund
- Woman’s Club of Bethlehem Fund

Community Endowment Funds | Responding to Community Needs

The flexibility of unrestricted giving enables the Community Foundation to respond to the community’s most pressing needs.

- 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
- The Lambert Durham Family Fund
- Lehigh Valley Forever Fund
- Frank L. Marcon Fund
- Horace R. Miller Fund
- Perna Family Fund
- Albert M. Reed Fund
- Katharine March & Stanley J. Thomas Memorial Fund
- Bernard J. Story Fund

21 New Charitable Funds

Agency Funds

- BEST Scholarship Endowment Fund
- City of Easton Sports & Recreation Fund

Designated Funds

- Jordan United Church of Christ Cemetery Association Endowment Fund
- LifePath Employee Award Fund
- Link Family Designated Fund

Donor-Advised Funds

- Anthony Michael Durman Foundation Fund
- Cindy Miles Adaptive Fund
- David and Carol Osborn Family Fund
- Dr. Lisa S. Bunin Foundation Fund
- Geoff Chenworth Memorial Fund
- John C. McGuire Memorial Fund
- Jonathan Ringer Foundation Fund
- Link Family Donor Advised Fund
- myHR Partner, Inc. Fund
- Peg DeAngelo Memorial Fund
- Peter Barter & Linda Bartera Fund

EverGreen Funds

- Beall Fowler Family Fund
- Gadomski Foundation Fund

Scholarships Funds

- Bob Swick Memorial Scholarship Fund
- First Commonwealth *WE Thrive LV* Foundation Scholarship Fund

Unrestricted

- Lambert Durham Family Fund



Giving 2022-23



In-Kind Gifts

- Advanced Cleaning Solutions
- Luis Campos
- DeSales University
- Level Web Development LLC/Google Ads

Sponsors

- Client 1st Financial Fund of LVCF
- Plants Alive, Inc.

Our Promise to Donors and Fundholders

The Lehigh Valley Community Foundation has a promise for you.

We **CONNECT** you to community needs by providing a highly personalized and effective approach to philanthropy.

We **GROW** a stronger community by helping you fulfill your charitable vision and grow a charitable legacy.

We **FUND** nonprofits and partner in the community to improve the quality of life in our region as a trusted and respected grant maker.



Rolland L. Adams Society



Governors Club

Includes donors who have cumulatively donated in excess of \$500,000 to a permanent fund or an active temporary fund

- Rolland Adams*
- Dr. William B. Agocs*
- Anonymous Donors
- Walter & Alma Bastian Foundation, Inc.
- William H. Burdette*
- Linda Bartera
- Michael J. Caruso
- The Donley Foundation
- Fleming Foundation
- Gadomski Foundation
- Luther J. Hottle, Jr.*
- Barry M. Kessler
- Mr. and Mrs. William and Constance Kreitz
- Lehigh Valley Helping Hand Foundation
- Charles & Ruth Marcon
- Pharo Family Foundation
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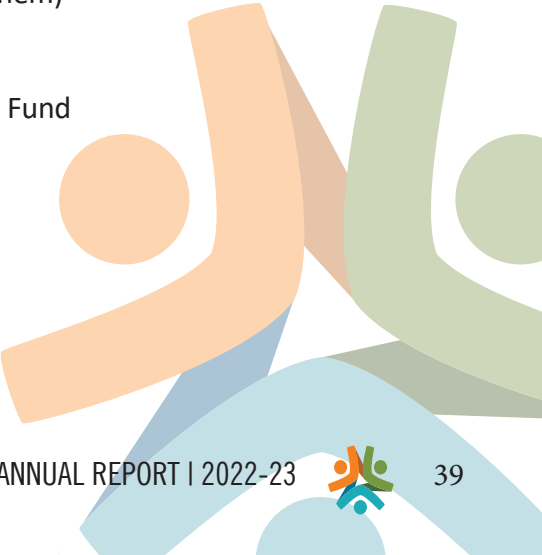
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*Denotes deceased members who are now ‘ad astra’ ...among the stars.



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- Stacy & Kerry Wrobel

THANK YOU DONORS & FUNDHOLDERS

All gifts to the 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.



Freddy Awards (Rick Kintzel/The Morning Call)

Legacy Society

- Rolland Adams*
- Dr. William B. Agocs*
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- George T. Walker*
- Stevie Gay Weart*
- Dr. Leonard A. Wenzel*
- Robert C. Wood*
- Mary Youtz



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

If you have included the Lehigh Valley Community Foundation in your will or other planned gifts and wish it to be recognized in the Legacy Society, please contact Maureen Connolley Wendling, Director of Donor Initiative, at (610) 351-5353 or email: Maureen@lvcfoundation.org

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

Grantmaking 2022-23



Philanthropic Partnership Grants

Through individual donor-defined funds, LVCF makes grants to meet a wide range of needs. Donor-defined funds include donor-advised funds, designated funds, scholarship funds, award funds, and certain area-of-interest funds. Refer to the full list of current funds of the Community Foundation [click here](#).

Community Investments Grants | Foundation-Directed Grantmaking

LVCF is incorporating Community Leadership into our Foundation-directed grantmaking platform. The community foundation industry defines Community Leadership as the following: The community foundation is a community partner that creates a better future for all by pursuing the community's greatest opportunities and addressing the most critical challenges, inclusively uniting people, institutions, and resources from throughout the community, and producing significant, widely shared and lasting results. [Community Investment Funds](#) generate the unrestricted dollars that support Foundation-Directed grantmaking.

In the 2022-2023 fiscal year, the Community Foundation continued the three major areas of its foundation-directed grantmaking platform. The Foundation will continue to adjust Foundation-directed grantmaking in future years based on what we are learning, an ongoing review of community needs in the Lehigh Valley, and donor interest. For example, we refined our youth and families grantmaking to focus more on early childhood education and care with our 2022-23 grantmaking. The Foundation-directed Leadership Grantmaking platform supports three focus areas, while continuing to provide ongoing support to other donor-defined areas or community needs (see [Support Grantmaking](#))



Foundation-Directed Leadership Grantmaking



Capacity Building

CORE Fellowship-
Equitable Capacity
Building with a multi-year
granting approach



Youth & Families

Ensuring Access to
quality childcare



Arts, Culture & Creative Economy

Creative Entrepreneur
Accelerator Program and
Creative Sector Flex Fund

Foundation-Directed Support Grantmaking Highlights



George T. Walker Charitable Fund

\$422,000 in grant funding was distributed to seven nonprofit organizations who are the named beneficiaries of the fund.



Lehigh Valley Homeless Veterans Fund

\$150,000 in grants help support three Lehigh Valley area nonprofits providing wrap-around services for homeless veterans.



Upper Bucks Community Fund at LVCF

\$35,600 in grants from the Richard E. Gasser Fund and Erwin J. and Gertrude K. Neusch Fund supported a variety of project in the Upper Bucks area.



BEST Awards 2022-23

The Bethlehem Educational Scholastic Trust (B.E.S.T.) Awards recognize excellence in teaching by educators who work in the Bethlehem Area School District (BASD). In 2019-20, the Community Foundation handed the award selection to the Bethlehem Area School District Foundation. [Learn more...](#)

The Seymour and Sophie Haber Award for Excellence in Teaching at the Elementary Level

Danielle DosSantos

Calypso Elementary School

The Bernie Cohen Award for Excellence in Teaching at the Middle School Level

Michiyo Salen

Northeast Middle School

The Anthony Ruggiero Award for Excellence in Teaching at the High School Level

Jennifer Volpato

Freedom High School

Scholarships & Awards

The majority of the Foundation's scholarships are administered through high schools, colleges and local organizations. Grants issued are payable to the schools or colleges/universities. The Foundation does not directly accept any applications for these scholarships.

Scholarships for high school graduates pursuing a post-secondary education are:

Bethlehem Area School District

Debra 'Frau' Brown Memorial Scholarship

Truman L. Frey, Jr. Scholarship

Bob Swick Memorial Scholarship

Betty Williams Memorial Scholarship

Bethlehem Area School District or Bethlehem Catholic High School

Senior Woman's Club of Bethlehem Scholarship

Bethlehem Catholic High School

Catherine Hilaire Thompson Nursing Scholarship

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

Boys and Girls Club of Bethlehem

Edwin F. Van Billiard Scholarship

Dieruff High School

Justin Sheftel Scholarship

Fleetwood Area High School

Arthur E. & Myrl G. Schaeffer Scholarship

Hanover Township Memorial Golf Tournament Scholarship

Liberty High School

Gene Buckno Memorial Scholarship (Accounting)

Lehigh Area High School

Damian C. Mele Memorial Scholarship

Nazareth High School

Bob Swick Memorial Scholarship

Northern Lehigh High School

Ann C. Bernard Memorial Scholarship



DeSales University's Daniel Muehlemann (r.) received the Andrew Budraitis Foundation 2023 Veterans Scholarship

Notre Dame High School

Tuskes Family Scholarships

Parkland High School

Class of 1961 Scholarship Fund

Frederick W. Hahn Memorial Scholarship

Gary D. Martz Class of 1974 Scholarship Fund

Anthony Severo Memorial Scholarship

Justin Sheftel Scholarship

Miss Pennsylvania Scholarship Fund

Phillipsburg High School

William & Jamie Soukup Reid Memorial Scholarship

Frances Sadler Award for Nursing

Wilson High School

Wilson High School 2006 Football Champions Scholarship

William Allen High School

Justin Sheftel Scholarship

Scholarships for students attending the following post-secondary institutions are:

Case Western Reserve University

Dr. Joseph Perna & Hilda Perna Memorial Scholarship

DeSales University, Department of Nursing & Health

Sue Ratzell Scholarship for Nursing

The Juilliard School

Raymond-Cryder Scholarship

Moravian Univ. & St. Luke's Hospital School of Nursing

Reverend Douglas Caldwell Nursing Scholarship

Northampton Community College

Beall Fowler Northampton Promise Scholarship

Simmons College, School of Nursing & Health Sciences

Carol (Rodgers) Jaffe & Donald Jaffe Scholarship

St. Luke's Hospital School of Nursing

Elizabeth Behr Agocs Scholarship

West Chester University

Raymond-Cryder Scholarship

College/University Located in Lehigh, Northampton, Carbon, and Monroe Counties

Buckno Lisicky Scholarship (Accounting)

Scholarships for Students & Veterans Pursuing a STEM Education at a Lehigh Valley College or University:

Andrew Budraitis Foundation Scholarship

Stephanie Olexa and Seth Weber Scholarships

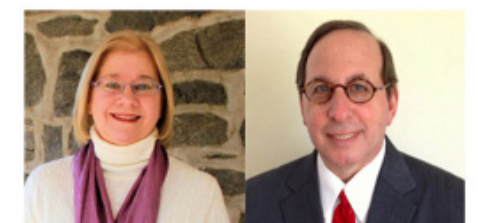
LVCF administers an application process for two annual scholarships for high school seniors attending public, private or charter high schools in Lehigh, Northampton and Bucks counties.

Stephanie Olexa and Seth Weber Scholarship for Criminal Justice

Awarded to a HS senior who will be majoring in criminal justice or law enforcement at an accredited institution for post-secondary education.

The Stephanie Olexa and Seth Weber Scholarship for the Life Sciences


Awarded to a HS senior who will be majoring in the life sciences at an accredited institution for post-secondary education. [Learn more...](#)





Stephanie Olexa


Seth Weber


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LVCF Staff as of 01/2024



History

Established in 1967 as the Bethlehem Area Foundation, the Foundation was regionalized and re-named in 1992 in order to serve the entire Lehigh Valley. What was preserved in this transition is the true community spirit of the Community Foundation. The Bethlehem Area Foundation was begun as part of the City's 225th anniversary celebration. Funds remaining from that celebration were used to create a permanent community endowment, the Bethlehem Area Foundation. Those funds were contributed by schoolchildren, steelworkers, retailers, college professors, homemakers, and business leaders. It was a true community beginning for a community foundation, and that community spirit is at the heart of the Lehigh Valley Community Foundation. Today, the Foundation manages more than 290 charitable funds representing over \$75 million in assets. We connect donors who care with causes that matter. A leader in charitable giving in the Lehigh Valley for more than 55 years, we receive support from donors, manage funds to grow over time, and make high-impact grants to strengthen local nonprofits. We are a trusted advisor, partner, and community leader that makes giving easy, local, and impactful to ensure your legacy.

Mission

The Lehigh Valley Community Foundation promotes philanthropy in order to improve the quality of life in our region, encourage collaboration among area philanthropists, and to serve as a source of information and expertise regarding charitable giving.

Vision

The Lehigh Valley Community Foundation will be a major force in the development of philanthropy in our region. The Foundation will promote and encourage collaboration among area philanthropists, and will be a source of information and expertise regarding charitable giving. The Foundation will be recognized and respected for its trustworthiness, its permanence, and the quality of its Board of Governors.

Lehigh Valley Community Foundation

840 W. Hamilton Street, Suite 310, Allentown, PA 18101

Phone: (610) 351-5353 Fax: (610) 351-9353

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.