October 2026

LEHIGH VALLEY COMMUNITY FOUNDATION

CAUSE CONNECTION

Year-End Giving Starts Earlier Than You Think

December may still feel far away, but some charitable gifts need a surprisingly long runway—especially gifts of mutual fund shares. Starting early gives the Community Foundation, your financial advisor and the institutions involved enough time to coordinate the transaction and address any unexpected delays.

Here are the key dates and planning tips for year-end giving:

November 15 — Begin mutual fund transfers. Mutual fund gifts can take considerably longer than gifts of publicly traded stock because they may require new receiving accounts and coordination between multiple financial institutions. Please contact us before initiating the transfer so we can help gather the necessary information.

December 16 — Submit year-end grant recommendations. Donor-advised fundholders should submit recommendations by this date if they would like grants processed and delivered to nonprofits before the end of the calendar year.



Plan ahead for gifts of stock. Contact us before initiating a transfer so we can provide instructions and identify the gift when it arrives. Please allow ample time for the shares to be received and processed by December 31.

Start IRA charitable distributions early. If you are planning a qualified charitable distribution, ask your IRA administrator to begin the process well in advance. Be sure the payment identifies you and the LVCF fund that should receive the gift.

Don't leave checks, wires or ACH transfers until the last minute. Mail checks early enough to arrive by year-end, and contact us in advance for wire or ACH instructions.

Complete online gifts by December 31. Online contributions intended for the 2026 calendar year must be completed before the year closes.
Banks, brokerage firms, mutual fund companies and IRA custodians all have their own processing timelines. The earlier you contact us, the more we can do to help your year-end giving go smoothly.



Collective Grantmaking Snapshot

August & September 2026

This bi-monthly snapshot reflects the collective impact of donor-advised and other charitable funds at LVCF, supporting trusted organizations.

- $1.05 million awarded through 156 grants to 116 nonprofit organizations
- 19% of total grant dollars provided as general operating/ flexible support

Top Issue Areas by Dollars Granted

- Human Services: $414,450
- Community and Economic Development: $253,264
- Faith-Based Services: $127,933

Top Issue Areas by Number of Grants

- Human Services: 47 grants
- Arts, Culture, and Creative Economy: 32 grants
- Community & Economic Development: 27 grants

Nearly 43% of grant dollars stayed local in the Lehigh Valley



Before You Make Your Year-End Grants:

Five Questions Worth Asking

Year-end is one of the busiest times for charitable giving. It can also be a valuable opportunity to pause and consider not only where you give, but what you want your grantmaking to accomplish. Whether you support the same trusted organizations each year or are exploring new opportunities, these five questions can help make your year-end decisions more intentional.

1. What do I hope will be different a year from now because I gave?

Begin with the change you want to support rather than immediately choosing an organization or program. Are you hoping more children will enter school ready to learn? That families will have greater stability? That the arts will remain accessible? A clearer sense of the outcome you care about can help guide where your funding may be most useful.

2. Am I responding to what the organization says it needs—or funding what is easiest for me to see?

Donors are often drawn to programs with visible and immediate results. But nonprofits also need strong staff, reliable technology, sound financial systems and the flexibility to respond when circumstances change. Sometimes an unrestricted operating grant is the most useful—and most trusting—support a donor can provide.

3. Is my giving spread too thin to make a meaningful difference?

Supporting many organizations can reflect a wide range of interests, but dividing available funding into numerous small grants may limit what each organization can accomplish. Consider whether fewer, larger grants—or multi-year commitments to organizations you know and trust—could provide greater stability and impact.

4. Who is closest to the issue but least likely to appear within my usual circle?

Some of the organizations with the deepest community relationships are not the largest or most familiar. Smaller nonprofits, grassroots groups and organizations led by people with lived experience may bring insight that is easy to overlook. Year-end can be a good time to learn about organizations beyond your customary giving list.

5. What have I learned this year that should influence how I give next year?

Perhaps a community need became more urgent, an organization impressed you with its response to a challenge or a conversation changed how you understand an issue. Your grantmaking does not have to remain static. Reflecting on what you learned can help you deepen trusted relationships, reconsider priorities and make room for new ideas.

Thoughtful grantmaking does not require having every answer. It begins with asking good questions. If you would like to explore local organizations, discuss community needs or think through your charitable priorities, the Lehigh Valley Community Foundation is here to help. Contact me at carrie@lvcfoundation.org.

IN THE NEWS



Pessinas Honored with Linny Award for Arts Philanthropy

Michele and Michael Pessina received the Philanthropy in the Arts Award at ArtsQuest's Linny Awards on October 15, 2026, recognizing their commitment to expanding creative opportunities in the Lehigh Valley.



For the longtime philanthropists, that commitment is deeply personal. Their daughter, **Angela René Pessina**, was a Spanish teacher who loved children, language, music and art. After her death in 2012, they found a lasting way to honor her spirit through giving.

In 2013, they established the Angela René Pessina Foundation Fund at Lehigh Valley Community Foundation to support children's education and welfare. Their generosity also supports scholarships and creative learning opportunities that carry Angela's name forward.

The recognition celebrates their generosity and the enduring influence of a daughter whose passions continue to benefit others.

Read the full story on LVCF's website to learn how their daughter's life continues to inspire a legacy of giving.

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