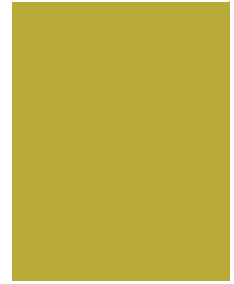




CREATE



DREAM



2016  
ANNUAL  
REPORT



SUSTAIN



theFoundation  
*for Enhancing Communities*

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We dedicate our 2017 Annual Report in memory of two of our long-time friends,  
Karen Snider and Miles J. Gibbons, Jr.



Karen Snider  
TFEC Board of Directors  
2005-2011  
2013-2017



Miles J. Gibbons, Jr.  
TFEC Board of Directors  
2007-2012

Karen and Miles will be greatly missed by  
The Foundation for Enhancing Communities,  
the community-at-large, and by those who knew  
them well. Our community is a better place because of  
their dedication and leadership.

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# Letter from President and Chair

Dear Donors:

We are pleased to present the 2016 Annual Report of The Foundation for Enhancing Communities.

The Foundation for Enhancing Communities and our six Regional Foundations, which include the Camp Hill Community Foundation, Dillsburg Area Foundation, Franklin County Foundation, The Greater Harrisburg Foundation, Mechanicsburg Area Foundation and the Perry County Community Foundation, had another very successful year. We ended the year with 36 new funds, management agreements and projects. Our contributions for 2016 totaled \$7.5 million, which resulted in total assets of \$80 million. Reaching this new pinnacle of growth is very exciting!

We welcomed five new members to the board of directors: Marilyn Arzon, Retired United States Air Force; Robert E. Caplan of River Wealth Advisers; Bony Dawood of Dawood Engineering, Inc; David Spang of Walker, Connor & Spang, LLC and Kimberly K. Schaller, Retired from Hershey Entertainment. We sadly said goodbye to five board members who served us well: Barbara Darkes of McNees Wallace & Nurick; Nancy Glen, Volunteer; Steve Hoffman, Retired KPMG; Cindy Tolsma of Dasher, Inc., and David Schankweiler of

Journal Multimedia and former chair. We sincerely appreciate their service over the past years and wish them well in their future endeavors, including their service in the community. We were extremely sorry to hear that Karen F. Snider, a current member of our board and Miles J. Gibbons Jr., a former member of our board, both passed away in January 2017. We are extremely grateful to have had the opportunity to work with them and we extend to their families our deepest sympathy for their loss.

We were pleased to graduate 16 members of the third year of participants from the Emerging Philanthropists Program (EPP), which is a partnership with Harrisburg Young Professionals (HYP). The participants, chosen by the HYP team from a pool of applicants of their members, meet throughout the year to learn more about philanthropy, the strengths and weaknesses of the region, and the grant process – from requesting proposals in the chosen area of interest to doing site visits to making the final decision on a \$5,000 grant to a nonprofit by the class. The first class established an endowment fund and on June 3<sup>rd</sup> an event called the Harrisburg Hoopla, a day of field games on City Island, good food and bands will benefit the endowment fund.

Our Women’s Fund had another successful year. We offered three events: the Annual Grantee Recognition Breakfast in March, our Power of the Purse Event in September, and a Wine and Cheese Event in November for potential members. We gave two Women in Philanthropy Awards: Anne Chapelka and Jane Murray for their extraordinary and generous service to the nonprofit community. We were honored to welcome 37 new Dream Team members. Elaine Nissley served as our chair in 2016. Her attention to detail, leadership and enthusiasm assisted the group to grow beyond its expectations in funds and new members. Sincere thanks to Elaine and the members of the Advisory Executive Committee for their loyal and dedicated work.

Our team consists of a strong, cohesive group of professionals whose contributions are most critical in meeting the strategic goals and objectives of an ever-growing, flexible, ever-adapting organization. We welcomed Faith Elmes in February as our Scholarship Associate, Jennifer Strechay in March as our Program Officer for Community Investment and Brigid McDougall in May as our Asset Development and Project Officer. We are pleased to thank Spencer G. Nauman, Jr., Esq. and Nate Flandreau, Esq. of Nauman, Smith, Shissler

& Hall, for their exceptional legal advice and Connie Siegel and Bob Dolan of Conrad Siegel Actuaries for their volunteer guidance and leadership in the area of investments.

You, our donors, provide The Foundation for Enhancing Communities with the ability to grow and flourish in our service to others in the region. We, without donor support, could not do what we do each year. Your dedication and commitment to making the region a better place to live, work and play is a precious gift we

cherish and value through your leadership and generous sharing of resources. We reach out to you for your observations, your suggestions and for your interest in and attention to our philanthropic services. The seeds that were sown in the past are constantly presenting themselves now in the form of new funds, projects, management agreements, estates, and bequests. As always, we ask you to assist The Foundation for Enhancing Communities to continue the task of sowing the seeds of today

that will be harvested tomorrow guaranteeing our legacy of service and relevance to the region in the future.

If you have input, questions, or would like additional information about any of our services and products, please contact Janice at [jblack@tfec.org](mailto:jblack@tfec.org), or at 717-236-5040. Visit our website at [www.tfec.org](http://www.tfec.org) for regular updates on general information about the overall organization, grants, scholarships, our electronic newsletter, news and events.

Sincerely,

  
Janice R. Black  
President and CEO

  
Kathy L. Pape  
Chair



**You, our donors, provide The Foundation for Enhancing Communities with the ability to grow and flourish in our service to others in the region.**

# Dream

# Start Your Charitable Journey

Since 1920, TFEC has been inspiring giving by partnering with donors to achieve their charitable goals, and strengthening our local communities by investing in them now and for future generations. We are your community foundation and we will be here to sustain your legacy forever.

## Ways to Give

You can choose to give cash to establish a fund or contribute to an existing fund; however, there may be significant tax advantages to contributing other types of assets such as:

- Marketable securities
- Closely held business stock
- Real estate
- Life insurance policies
- Mutual fund shares
- Nontraditional assets such as collections, art and antiques
- Qualified retirement plan assets such as IRA, 401(k), 403(b), or pensions

If you have any questions about our services or would like more information, please contact Janice R. Black, President and CEO, at [jblack@tfec.org](mailto:jblack@tfec.org) or Jennifer Doyle, Vice President of Development & Community Investment, at [jdoyle@tfec.org](mailto:jdoyle@tfec.org). You can also visit our website, [www.tfec.org](http://www.tfec.org), or call us at 717.236.5040.

## IRA Tax Rollover Provision

### Did you know...?

The IRA charitable rollover provision, made permanent in 2015 through the PATH Act, allows individuals 70 ½ years old or older to roll over up to \$100,000 from an Individual Retirement Account (IRA) annually to charity without being federally taxed.

This provision makes it possible for donors to establish funds now, during their lifetime, rather than through their estate plan, allowing them to see the positive effect on the community. The gift can be placed into a charitable fund in the individual's name, the name of their family, or in honor or memory of someone. It can be nonpermanent or endowed and could grow over time, into perpetuity supporting the nonprofit organizations and causes you care about.

## Closely Held Business Stock



Donors may create a fund and/or grow an existing fund through a gift of marketable securities, closely held business stock, or mutual funds.

### Vicki and Bob Dolan Fund

“Having a TFEC donor advised fund allows us to budget our contributions, but also allows us to be flexible when an unexpected need emerges. The DonorCentral website allows us to see where our

past philanthropy has gone and alerts us to other organizations that may deserve our support. By contributing to our fund with stock that has appreciated over a long time, we can deduct the full value of the stock from federal income taxes without having to pay capital gains tax on the appreciation. TFEC makes it very easy, their attorney prepares the necessary forms and a staff member comes to the office to execute the trades. We appreciate how TFEC helps us to help the community.”

- Bob & Vicki Dolan

# We can help you achieve your philanthropic goals



## I want to support...

### Nonprofits that are meaningful to me

#### Donor/Committee Advised Fund

You recommend grant recipients and amounts whenever you would like; the fund may be permanent or nonpermanent.

### Students pursuing higher education

#### Scholarship Fund

Grants in the form of scholarships are made based on the criteria you choose; the fund may be permanent or nonpermanent.

### A specific nonprofit that is important to me

#### Restricted Fund

You designate one or several nonprofit organizations as permanent grant recipients.

### The most pressing issues in Central Pennsylvania today and tomorrow

#### Discretionary Funds

You ensure funds will be available, in perpetuity, for the most current community needs. Grant decisions are made by volunteer advisory committees and are distributed through a competitive application process.

## Private Foundation Services

TFEC offers private foundations any number of services including a management service agreement, the establishment of a committee advised fund to facilitate the annual 5% spending requirement, and/or the dissolution of the private foundation and conversion to a named fund. We can also manage grantmaking programs.

### The Children's Home Foundation Fund

“The Board of Directors of the Children's Home Foundation was pleased to transfer our funds and the fund management of our organization to TFEC so that we can more efficiently support our mission to provide aid to economically disadvantaged children in Cumberland, Dauphin and Perry counties.”

- David Skerpon,  
Children's Home Foundation  
Board Member



## Employee Assistance Funds (EAF)

Sometimes known as ‘Hardship Funds,’ EAFs allow for employers or employees to donate to a fund which, in turn, helps fellow employees in need. Employees who need financial assistance due to an unforeseen circumstance, such as illness or an accident, can apply for help through the fund, fostering a sense of community within the organization.



“The Flagger Force Foundation is an employee-led, company-supported charitable foundation that oversees our Employee Hardship Fund. The Flagger Force Foundation was created to give back to our

employees who work hard day in and day out to provide safe, quality work zones for the public. Partnering with TFEC was the right choice for us. The TFEC staff understood exactly what we needed to establish the Foundation and made the process seamless for us.”

- Michele Doner, CEO, President,  
and Co-Founder of Flagger Force



# Start Your Charitable Journey

## Discretionary Funds

When you establish an Area of Interest or Unrestricted fund you are able to name your fund, personalizing it to create your legacy. This allows your legacy to live on in perpetuity, making a lasting gift that will address our region's changing needs, forever.

Discretionary funds provide the ability for quick response to changing community needs. Earnings from these funds provide grants to a variety of nonprofit organizations throughout the central Pennsylvania counties of Cumberland, Dauphin, Franklin, Lebanon, Perry, and northern York. Grant decisions are made by volunteer advisory committees and are distributed through a competitive application process for the most current community needs.



## Unrestricted Fund

This discretionary fund is not specifically designated to a particular use by you and is used as community needs change year to year.

### Jonathan Vipond, III and Tim E. Bunner Fund

*“Our purpose and thinking then and now was to give modestly, but effectively, to a community foundation that would better than we be able to assess, measure, and support the most significant unmet needs in this community, which has given us generous lives and livelihoods. We still believe and know that TFEC is that community resource to handle that task.”*

- Jonathan Vipond, III and Tim E. Bunner



## Area of Interest Fund

This discretionary fund is designated to one area of charitable interest by you, such as the arts, health and human services, education, and more.

The Patricia H. Ferris Family Fund, a fund of the Mechanicsburg Area Foundation, was established to support programs that serve families with children that include a food/nutrition component to their services.

### Patricia H. Ferris Family Fund

*“I established this fund as a living tribute to my mother who died in November 2015 from Alzheimer's Disease. This fund felt to me, to be a perfect way to use money that she left. As a kindergarten teacher for many years she would very often talk about how some of her children were not receiving the nutrition that they needed to learn and be attentive in class. When I continue to add to the fund I will think of my mom and her legacy of care for children.”*

- Patricia H. Ferris

# We can help you achieve your philanthropic goals



## Anyone can Give through TFEC

Anyone can create a fund to leave a legacy that impacts the community forever. The minimum contribution level to start a fund is \$10,000, and you have five years to reach that level. That's \$2,000 per year over 5 years, or less than \$200 a month!

Created to keep Thad's spirit alive, Brian and Cindy Gayman will raise funds and make gifts until they reach the fund minimum at which time the scholarship fund will make its first award.



### Thad G. Gayman Memorial Scholarship Fund

*“We chose TFEC because they were able to provide the resources we needed to successfully organize this fund. We had to do extensive research to complete tasks in the beginning, but after meeting with TFEC, they were able to handle everything for us and were very knowledgeable. As a small group of individuals, having the opportunity to take our time reaching the fund minimum has made starting this fund significantly less stressful. TFEC has allowed us to focus on planning our fundraising events and enjoying them without added responsibilities.”*

- Brian & Cindy Gayman

## You can give a gift of Real Estate



You can benefit nonprofit organizations through a gift of real estate that is received, held, managed, leased and otherwise processed by TFEC Properties, Inc. TFEC Properties, Inc. can handle charitable gifts of real estate and can even consider accepting part sale/part gift transactions, such as real estate with a small mortgage still to be paid. TFEC

Properties, Inc. can also receive real estate in various arrangements like gift unitrusts, which address your ongoing interests and income needs in your lifetime to make the charitable gift now and in the future. Additionally, TFEC Properties, Inc. can arrange for real estate and provide management of real estate for the benefit of other nonprofit organizations.



*“We decided to work with TFEC Properties to meet our goal of liquidating real estate for charitable purposes because of their knowledge and expertise in processing charitable contributions. We have used their services several times and would encourage others to pursue this avenue of charitable giving.”*

- Ron and Lenora Stern

# Dream



# Women's Fund

## Overview

Established in 2000, the Women's Fund broadens the awareness of, and response to, issues affecting women and girls through the power of collective philanthropy. The Women's Fund is part of a nationwide movement, allowing women to fulfill their desire to give back.

Objectives of the Women's Fund:

- Educate others about philanthropy and issues affecting women and girls
- Raise money and award grants that address issues affecting women and girls
- Promote inclusiveness and cultural competency in giving and grantmaking
- Empower all women to recognize themselves as philanthropists

## 2017 Advisory Committee

The Women's Fund is led by a dedicated group of women:

- |                             |                           |
|-----------------------------|---------------------------|
| • Elaine Nissley, Chair     | • Gloria Merrick          |
| • Rosemary Browne           | • Shileste Overton-Morris |
| • Dr. Carolyn C. Dumaresq   | • LaVette Paige           |
| • Sylvia Hepler, Vice Chair | • Jessica Ritchie         |
| • Kandice Kerwin Hull       | • Meghan Skelly           |
| • Jennifer Lazar            | • Melanie Stine           |
| • Kelly Light               |                           |

There are also three volunteer subcommittees that work to achieve the goals and objectives of the Women's Fund: Grantmaking, Marketing & Events, and Women in Philanthropy.

## Women in Philanthropy

In 2016, we bestowed special recognition to two award winners: Ms. Anne Chappelka and Ms. Jane Murray. Each was honored for their many years of providing time, talent and treasure to causes supporting women and girls in our community. In addition, we awarded the Inaugural Youth in Philanthropy award to two young women, Madison and Alexa Schwab, who exhibit the same qualities.

A *Women in Philanthropy* awardee must be nominated by her peers as an individual who has made outstanding contributions to local nonprofit organizations. Fifteen women, and now two young women, have received this award since its inception in 2011.



Madison and Alexa Schwab



Jane Murray



Gloria Merrick presenting to Anne Chappelka

**Women's Fund**  
A SPECIAL INITIATIVE OF TFEC

## Invest in Women... Change the Future



"The Women's Fund is one quarter of the way to our goal of a one million dollar endowment fund. In addition to funding the endowment, the Women's Fund has granted over \$115,000 since 2008. These grants have enabled many nonprofit organizations to meet the

needs of women in Dauphin, Cumberland, Lebanon, Perry and Franklin counties. We have made strides in the areas of economic self-sufficiency, health, and education and we look forward to continued success and your support at our signature events."

- Elaine Nissley, Chair

## Join the Movement

A \$1,000,000 endowment will enable the Women's Fund to enhance the lives of women and girls in Central PA now and in the future. You can help us reach our goal by joining the more than 100 individuals who are changing the lives of women and girls.

With your first \$1,000 gift, you become a member of the DREAM TEAM; with a total of \$2,500 in contributions, you can help CREATE a difference in the lives of women and girls; with a total of \$5,000 you can help SUSTAIN the collective impact of the Dream Team; and when you reach the mark of \$10,000, you will INSPIRE others with your gift and join the ranks of an elite group of givers who believe that investing in women and girls is a worthwhile endeavor. Consider also creating your LEGACY to support women and girls in Central PA now and forever.



## Central Susquehanna Intermediate Unit

In 2016, the Women's Fund awarded the Central Susquehanna Intermediate Unit (CSIU) a \$2,000 grant for Pinnacle Place, a home for young mothers and their children where they are connected to resources that will help them continue their education, become employed and learn how to become independent. Those who live at Pinnacle Place are there because at some point in their lives they experienced trauma in some way; it is

the mission of the program to help the young women overcome that trauma and move toward a safe and secure life.



"Pinnacle Place has a need for supplemental economic supports to help with the mothers' transition to launching a successful and self-sustaining career, such as the needs for appropriate work clothes, transportation to and from school or work, and the costs of childcare services for evenings and weekends so the mothers can report to work. The grant from TFEC's Women's Fund will assist young women from Perry County in these ways on their journey to becoming a self-sufficient family."

- Kim Eroh, Family Education,  
Program Manager, CSIU



# Scholarships

You can help students access higher education

There are several types of scholarship funds that you can establish: permanent or nonpermanent and restricted or committee advised.

You determine the criteria for your scholarship such as financial need, class rank, GPA, leadership, etc. You can select scholarship awardees with the assistance of a committee using objective criteria or assign a committee to make decisions based on your criteria. TFEC administers the award process and payment of all awards each semester for you. Scholarships may only be used towards the cost of tuition, fees and/or books.

## Scholarship Funds

### TFEC Scholarship Funds 2016/2017 Academic Year

TFEC manages more than 120 scholarship funds that relieve some of the financial burden that higher education can place on a student and his or her family.

Total Student Award Recipients

210

Total Scholarships Awarded

\$577K+

### Management Service Agreements 2016/2017 Academic Year

TFEC administers three scholarship funds: the Samuel L. Abrams Foundation Scholarship, the Ray S. Shoemaker Scholarship, and the Leon Lowengard Scholarship.

Total Student Award Recipients

183

Total Scholarships Awarded

\$707K

### Partnership for Access to Higher Education

TFEC is one of 37 partners with the AES/PHEAA Partnership for Access to Higher Education (PATH) Program. TFEC scholarship recipients are eligible to have their awards matched provided they attend a school in PA and have a PA grant. Scholarship recipient information is submitted to PHEAA by TFEC staff, requiring no additional work from the scholarship recipient.

### PATH Program Matching Funds

\$172K+

PATH Program Match Amounts

up to \$2,500

## New Scholarship Funds Established in 2016



### Thad G. Gayman Memorial Scholarship Fund

The main goal of this scholarship fund is to keep Thad's spirit alive through both his passion for cars and the joy he found in repairing them by providing a student with financial support toward their education and to pursue their own passion.

### Honorable Todd A. Hoover Memorial Scholarship Fund

This scholarship fund was started to honor the life and work of Todd A. Hoover who was dedicated to his family, faith, and public service. He felt privileged to hold a position in the Dauphin County Court of Common Pleas for over 20 years and strived to use that opportunity to enrich the lives of others. This fund was started with the hopes of empowering Upper Dauphin Area High School students to pursue a life of public service.

### Operation Wildcat Scholarship Fund

Operation Wildcat was formed in 2006 to pool community resources to help students and families in need. To honor the 10-year anniversary, Operation Wildcat established this scholarship for any Mechanicsburg Area School District student planning to attend any college, university, or trade school post graduation.

### St. Hilaire French Scholarship Fund

The St. Hilaire French Scholarship Fund will benefit graduating seniors from Cumberland Valley High School who have plans to study French as a major or minor at a college or university, or who have plans to study in a summer program in the province of Québec, Canada.

### Lieutenant Colonel Robert ("Bob") Stone Jr. Memorial Fund

Robert ("Bob") Stone Jr. was a 1980 graduate of Sun Valley High School where he captained the football team and was also president of the National Honor Society, and named All-County in football and track. In 1980, he graduated

fourth in his class and received an appointment to West Point, where he had been recruited for football. Bob's family and friends established this scholarship award in his honor to be given to a Sun Valley High School student who meets the criteria of the established scholarship fund.

### Kenneth A. Viani & Pauline M. Viani Scholarship Fund

This scholarship fund was established through the estate of Kenneth "Tony" Viani to support students from Susquenita High School who plan to study education with the intent to teach after graduation. Preference is given to students planning to teach biology or a science-related field.

## Ely-Wain Scholarship Fund

Anne and Ric Wain created this fund to honor their parents' contribution to their own educations, and in tribute to both families' respect and love for the natural environment. The scholarship supports seniors pursuing sustainability-related degrees.

"Ric and I would like to believe sustainability will be fully understood and embraced during our lifetime. We established this fund as an enduring commitment to today's and tomorrow's students working towards a reality in which humankind and nature co-exist in unified, peaceful, and prosperous harmony."

- Anne Wain



# Create

# Emerging Philanthropist Program

## Program Overview

The Emerging Philanthropist Program (EPP), a partnership between TFEC and Harrisburg Young Professionals, seeks to engage Harrisburg's rising business and community leaders with the great possibilities that lie within philanthropic endeavors in Harrisburg and answer three questions:

- What does it mean to be philanthropic?
- How do I understand the needs of our community?
- What can I do to make an impact?

The 10-month program provides resources and educational opportunities for Harrisburg's developing leaders who wish to be actively engaged in giving back to their community.

A partnership between

**theFoundation**  
for Enhancing Communities

**HARRISBURG**  
YOUNG PROFESSIONALS

## Topics Covered

- Needs of the community
- Grantmaking 101
- Giving back to your community
- Fundraising 101
- Personal philanthropy
- Wealth management practices

In the culminating experience, the class applied their newly learned community and grantmaking skills by awarding a grant to a nonprofit organization serving Harrisburg city with programs that provide education and/or reintegration services for diverse populations with behavioral health and addiction needs; a topic chosen by the class after assessing community needs. After a competitive grantmaking process, the class awarded Shalom House a \$5,000 grant.



**"The Emerging Philanthropist Program is a great way for our members at HYP to learn and develop the art of philanthropy, as well as financially contribute to a nonprofit in the area."**

-Derek Whitesel, Executive Director, HYP

## 2016 EPP Class

The 2016 EPP class consisted of 17 members of the Harrisburg Young Professionals:

Abigail G. Beswick	Mridula Mishra
George M. Fernandez	Byron T. Rockwell
Katherine E. Harner	Katelyn Savidge
Aimee N. Haskew	Amanda J. Seig
Stephen M. Hickey	Joshua D. Smith
Christopher P. Houck	Brian F. Spackman
Jessica N. Johnson	Gabriella E. Vreeland
Alison F. Lintal	Kathleen Wojtowicz
Doina Macari	

## Engaging Harrisburg's next generation of philanthropists

# \$5,000

Grant amount awarded to Shalom House for their Partnership for Independence and Positive Mental Health.

*"We are truly proud of the Emerging Philanthropist Program and the over 40 young adults who have graduated from the program. Through this experience they have grown in knowledge and experience on how instrumental philanthropy can be in making our community a better place."*

- Janice R. Black,  
President and CEO, TFEC



Shalom House seeks to empower women and transform lives. For 30 years it has been a safe home for up to 21 women and their children during times of crisis as they work with counselors to achieve self-sufficiency. Shalom House offers emergency sheltering, the SHARP program serving chronically homeless women, and the SHARP VETS program, a transitional housing program for homeless, female veterans.

The Partnership for Independence and Positive Mental Health, a partnership with Elizabethtown College's Occupational Therapy program that

first began in June, is an initiative to address the root causes of homelessness, which often includes mental health issues. Occupational Therapists are equipped with a coping skills toolbox that provides them with a variety of techniques to help women address mental and behavioral issues that are a barrier to personal growth and success. These tools are designed to help residents with issues of self-control, negative thoughts and attitudes, and inappropriate responses rooted in emotion and trauma issues.

**"The impact that the students have had on our housing program participants has been profound. The students help assess the mental health issues that have been blocking a woman's potential to break out of the cycle of poverty. This has elevated our ability to assist women and leverage community resources to address a gap in services. The mental health issues are very real factors in whether a resident will achieve long-term independence and the skills learned from the Occupational Therapists are often sufficient to help a woman gain control, and learn how to maintain control over previous mental barriers."**

- Denise Britton, Executive Director, Shalom House

# Create



# Legacy Giving

In addition to accepting direct contributions, TFEC assists you in making legacy gifts. Often these gifts are deferred based upon your personal estate planning and income needs. Even though gifts might be deferred, they could have immediate tax benefits. Deferred gifts include bequests, charitable remainder trusts, charitable annuity remainder trusts, charitable lead trusts, and real estate with retained life interest. When you make a legacy gift, you are invited to become a member of our 1920 Legacy Society. Members of the 1920 Legacy Society receive recognition on our website, invitations to special events, and a token to say thank you for entrusting TFEC with your legacy.



“Over the years, we enjoy the personal value of making meaningful contributions to our community. There is an even greater satisfaction in knowing our legacy will continue to support the causes we cared about during our lifetimes.”

- David and Jeanne Reager

## 1920 Legacy Society

Sloan and Susan Auchincloss  
Sara Jane Aucker  
William Banks  
Janice R. Black  
Evan R. Bostdorf  
Harold and Dolores Brake  
Dr. Maury Brenner  
Dr. David Bronstein  
Eric L. Brossman  
Melvin Brownold  
Bob and Barbara Clay  
A. Wesley Carr Jr.  
Philip and Carol DiMartile  
Mary Fox  
David E. and Jane Edgar Freet  
Gordon E. Fry  
Alice G. Girvin  
Norma J. Gotwalt  
Raymond L. and Frieda Gover  
James E. Grandon, Jr. and Jean Grandon  
Lois Lehrman Grass  
Jennifer Greene  
Jody Heberling & Beth Helterbran  
Glenn and Barbara Holliman  
Martha B. Hostetter

Robert F. Hostetter, Jr.  
Kenneth S. Knowlton  
Margaret D. Kooistra  
Eric P. Krell  
Dr. Robert Lau and Monte Avery  
Richard and Jan LeBlanc  
William Lehr, Jr. and Beverlee Lehr  
Barbara Lock  
Robert Lynch & Dianne Brace  
George and Carrie Lyter  
Jerry W. Martin and Michael E. Knaub  
L. Jeffrey and Sharon Mattern  
James M. and Janet M. Maynard  
Harold A. McInnes  
Linda Miller and Rob Adelberg  
Wayne and Susan Mountz  
Phyllis Mowery  
Sidney Palmer, Jr. and Ellen Palmer  
Kathryn S. Patterson  
Charles and Ellen Peters  
Nancy Reist Preis  
Marilyn Pukmel

David W. and Jeanne Reager  
Neal and Linda Rhoads  
Helga Rist  
William and Susannah Rothman  
Ray Rotz  
Patricia E. Roussel  
Diane L. Sandquist  
Charles G. Schlichter, Jr.  
Conrad M. and Gail Siegel  
Dr. and Mrs. Robert E. Singiser  
Jack Snider  
Stephen and Lisa Spector  
Jennifer L. Steigelman  
Dean and Gail Stephens  
Larry W. and Mary Alice Stoops  
Marilyn Lee Urie  
Anne Ely Wain and Richard S. Wain  
Gale Wenk du Pont  
Wallace and Lois Willig  
Linda M. Zullinger

# Achieve your charitable goals with a future gift



## Split Interest or Charitable Trusts

TFEC manages and serves as trustee for 43 charitable trusts, valued at \$10.1 million (12/31/16). These trusts include Charitable Remainder Unitrusts, Charitable Remainder Annuity Trusts, and Charitable Lead Trusts. These agreements are legal arrangements where you can transfer assets irrevocably to a trust, which then invests them and creates two (split) interests. You can establish these legacy gifts to increase the impact of your charitable gifts, receive a lifetime income, and/or qualify for income, gift, and estate tax benefits. Charitable trusts have a minimum \$50,000 contribution requirement. In most circumstances, legal services are required and are available to you without charge through TFEC's relationship with Nauman, Smith, Shissler & Hall, LLP.



“Connie and Gail established the Charitable Remainder Trust in 1997 because they had a number of stocks that had substantially grown in market value from their original cost. Connie also wanted to see the operation of a CRT in actual practice, since he was about to become the chair of TFEC's Board of Directors. Donating the stocks to TFEC enabled the Siegels to get a partial charitable deduction for their gift and also enabled them to spread capital gain taxes over future years. Additional funds could be added to the same trust in future years. In addition, the charities selected by Connie and Gail to receive permanent funding after the death of the survivor could also be changed while either was alive. The Siegels receive a payment out of the CRT each quarter that may be used for any purpose of their choice. Since income from the CRT is taxable, we provide them with the required tax forms.”

- Janice R. Black, President and CEO, TFEC, in reference to Conrad M. and Gail Siegel's Charitable Remainder Unitrust



# Parents & Partners

*Improving kindergarten readiness with a focus on professional development*



Targeting families of the five elementary schools in the Harrisburg School District, Parents & Partners addresses crucial economic and educational issues by providing early learning education in our community. Year two of this three-year grant initiative focused on supporting early education providers with professional development opportunities.

The Early Childhood Engagement Group, formerly the Dauphin County LEARN, guides the work of this partnership.

## Early Childhood Trainings

Harrisburg School District, a primary partner of the Parents & Partners program, is required to complete the Kindergarten Entry Inventory (KEI) assessment on each kindergarten student. Parents & Partners use the results of these assessments to provide trainings for early learning providers and kindergarten teachers related to the areas of weakness in kindergarten readiness skills. The trainings relate to early literacy, math, and social/emotional school readiness skills.

Parents & Partners also provides tailored trainings to meet the needs of Family Engagement Specialists in the Harrisburg School District. Topics have included parent/teacher conferences, communication, and ways to engage every parent in their child's education.

Additionally, Parents & Partners offers professional development to early learning providers six times throughout the year. Topics have related to acquiring special services for children and families, early education needs in the community, and social/emotional development.

**“Our school’s collaboration with Parents & Partners has provided me with valuable trainings. The information has helped me in my job as a Family Engagement Specialist.”**

- Nichole Echols, Harrisburg Family Engagement Specialist

## Kindergarten Transition Conference

In 2016, Parents & Partners and the Lancaster-Lebanon IU-13 collaborated to bring a two-county Kindergarten Transition Conference to the area. Early learning providers, school district staff, and community partners came together to learn how to further grow and adapt transition practices. Research shows that a seamless transition into kindergarten is critical for young



children in order to be successful in their future academic careers—this transition sets the tone for their future school experiences. This year’s presenters provided their best practices in how they handle this important transition for children, families, and educators with a focus on brain development in children.

## About Parents & Partners

Parents and Partners is a special initiative of TFEC that provides support for the whole family, broadens community resources by giving children and their families the tools they need to be successful, and builds strong partnerships between the community, early learning providers, and the Harrisburg School District. TFEC developed the Parents & Partners program through the Early Childhood Education Community Innovation Zone Grant of \$75,000 a year for three years, with a match from TFEC, local partners and organizations. Primary partners include Capital Area Head Start, a division of Keystone Human Services, and Harrisburg School District.

# The Whitaker Foundation Regional Program



## *Funding math and science education programs in Cumberland, Dauphin, and Perry counties*

In 2000, The Foundation for Enhancing Communities (TFEC) was honored to begin administering the Whitaker Foundation’s regional grantmaking, granting approximately \$2 million annually for math, science, and economic self-sufficiency programs serving Cumberland, Dauphin, and Perry counties.

In 2006, TFEC was the recipient of a final \$5 million gift from the Whitaker Foundation with the stipulation to spend out the funds over a 10-year period. The gift established the Whitaker Foundation Regional Program consisting of

three initiatives: the Math and Science Institute, a grant-making program to benefit math and science programs, and scholarships. The Math and Science Institute was managed through a relationship with Project Forward Leap and offered a five-week residential program on a college campus as well as Saturday tutoring and enrichment programs for Harrisburg School District students in grades 6 - 9. The scholarship program offered scholarships for out-of-district students to attend Sci-Tech High School in the Harrisburg School District. Finally, the grantmaking program offered two competitive

grant cycles per year with the intent of granting \$100,000 annually for 10 years. Grants were awarded to nonprofit organizations serving Cumberland, Dauphin, and Perry counties to improve math and science proficiency programs. Through sound investment practices, the program completed its grantmaking in 2016 having granted out more than \$1.3 million dollars throughout the lifetime of the program. Additionally, the final escrow account granted \$2.6 million to the Whitaker Center for Science and the Arts and \$1.3 million to TFEC.



## Girl Scouts in the Heart of Pennsylvania

In 2016, the Whitaker Fund for Math and Science Education awarded Girl Scouts in the Heart of Pennsylvania a \$25,000 grant for their Girls Go STEM program. Highlighting their focus on offering hands-on, cooperative and inquiry based education opportunities for girls and working to negate the current gender barriers of the STEM workforce, the grant will provide specialized program materials and equipment for the signature program aimed to girls 5-17 years old. Led by girls and focused on research-proven learning methods of girls, the Girls Go STEM programming includes robotics, building design, space exploration, physics and more through the hands-on interactive discovery of the variety of STEM disciplines. Recognizing that time and resources are limited in the traditional school day, Girls Go STEM uses a core curriculum based education platform designed in accordance with the Pennsylvania Department of Education state standards.

**“Funding and support from The Whitaker Fund for Math and Science Education has provided the opportunity to reach more girls throughout Cumberland, Dauphin, and Perry counties, inspiring them with high-quality STEM learning opportunities, and possibly changing the course of their lives.”**

- Ellen Kyzer, Chief Executive Officer and a former Girl Scout, Girl Scouts in the Heart of Pennsylvania

# Sustain











# 2016 Total Grants

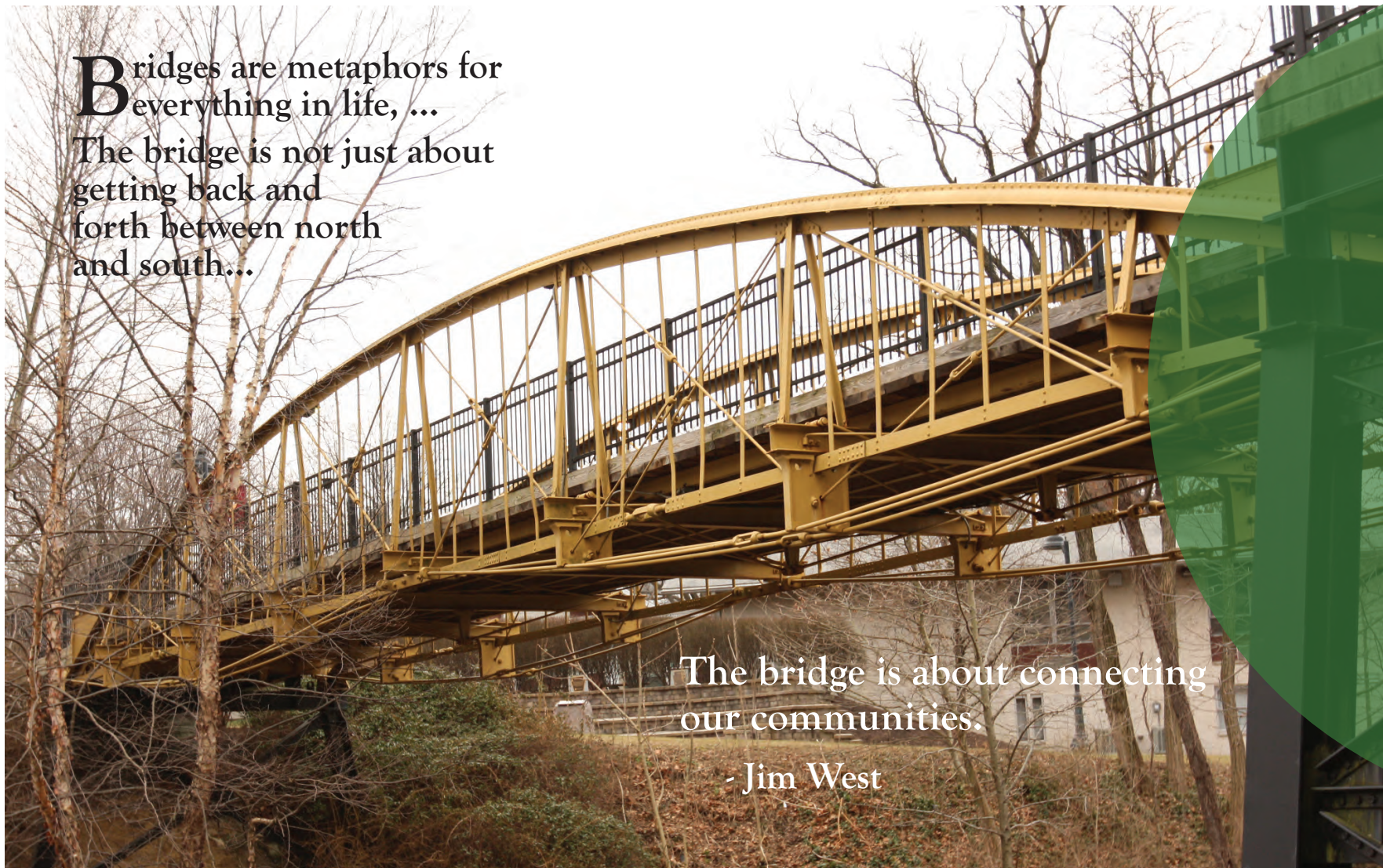
\$4,271,326

# 2016 Total Grants by Fund Type

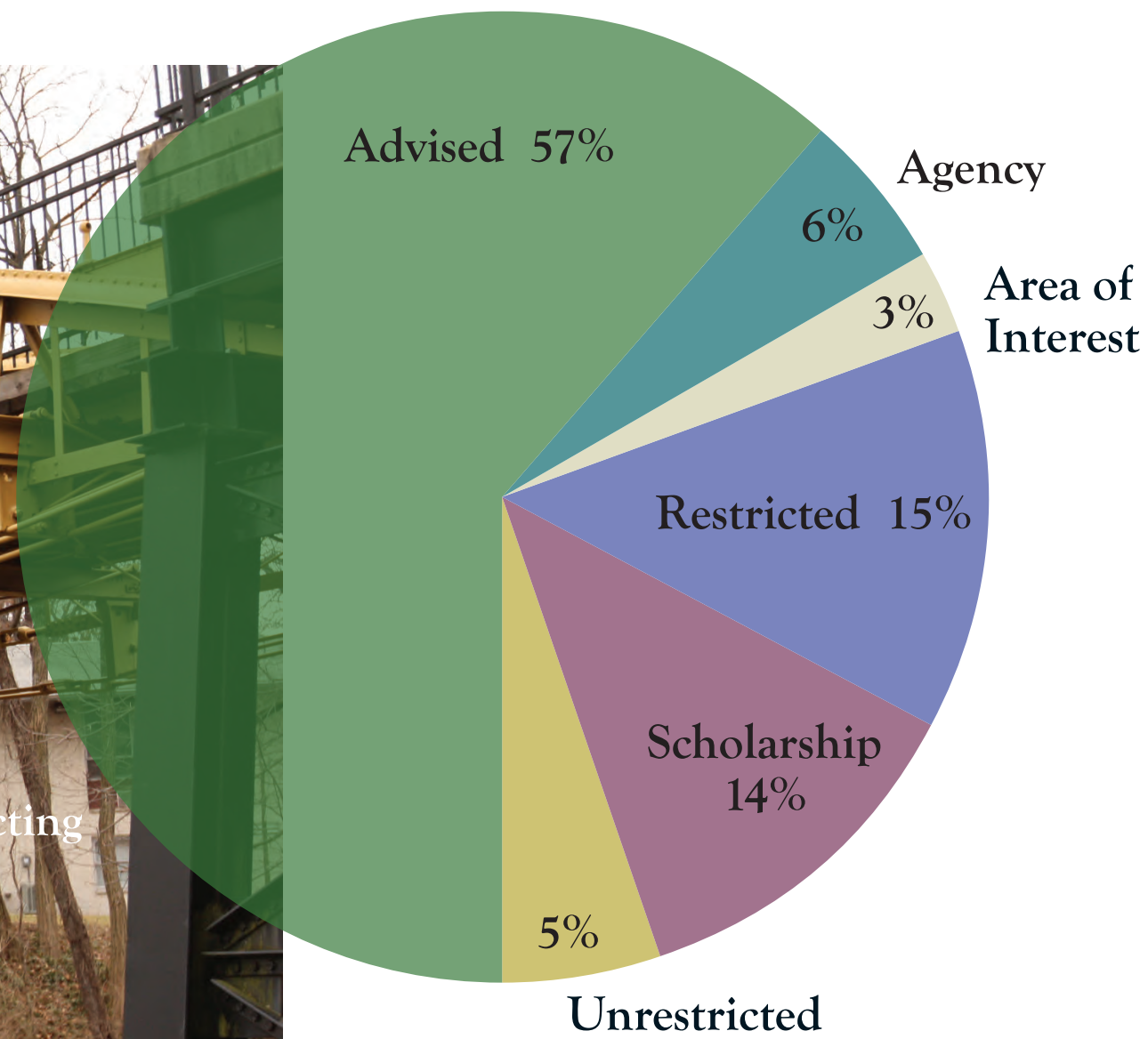
## 2016 Total Grants by Program Area

Arts & Humanities	Community Development
 12% \$511,466	 15% \$647,876
Education	Environment
33%  \$1,424,374	5%  \$206,641
Health	Human Services
 9% \$371,485	 10% \$421,087
Math & Science	Religion*
5%  \$223,921	11%  \$464,476

\*donor advised funds only



Henszey's Bridge on the campus of Central Penn College





# Greater Harrisburg Foundation

Established 1920

## A Regional Foundation

Serving Cumberland, Dauphin, Franklin, Lebanon, and Perry Counties and the Dillsburg Area

## Grant Committee

Karen Snider, Chair<sup>^</sup>  
Marilynn R. Abrams  
Marilyn E. Arzon\*  
Jennifer N. Baar\*  
Dr. David Bronstein  
Barbara A. Darkes#  
Linda A. Hicks  
Devin Q. Langan\*  
Renee L. Lieux

David B. Skerpon  
Richard D. Spiegelman,  
Incoming Chair\*  
Cynthia T. Tolsma,  
Previous Chair#  
L. Jeffrey Mattern,  
TFEC Board of Directors,  
Chair, ex officio

\*New in 2017

#Term Expired in 2016

<sup>^</sup> Our dear friend, Karen Snider, passed away in early 2017. Karen was heavily involved in the community and active with The Foundation for Enhancing Communities. She will be greatly missed by the Greater Harrisburg Foundation, the community-at-large, and by those who knew her. Our community was a better place because of her.

2016 Total Assets

**\$62,104,137**

(76.70% of total TFEC assets)

2016 Total Grants

**\$3,452,641**

(80.83% of total TFEC grants)



# Pennsylvania Regional Ballet

In 2016, the “Arts for All” partnership awarded the Pennsylvania Regional Ballet a \$3,000 grant for the R.A.I.S.E. program. R.A.I.S.E (Refined Arts Inspire Successful Education) is an educational arts program that engages 5th-graders through instruction of dance, music, choreography, and uses movement as a tool to instill in children discipline, commitment, teamwork and self-confidence.

Students participate once a week in a 12-week residency that culminates with a final performance. Two instructors and a classically trained pianist work with students in an environment that encourages positivity and creative thinking, which in turn helps develop students’ self-esteem. While working with each child artistically, physically and mentally, students gain an understanding that hard work, discipline and commitment can lead to future successes beyond the classroom.



“R.A.I.S.E. is much more than dance and movement; it’s a program that nourishes the whole child. Our children need 21st Century Skills like critical thinking, collaboration, agility, oral communication, analyzing information and curiosity. These are all skills that R.A.I.S.E. provided the children of South Side Elementary. I had chills watching the final performance, as nearly 120 5th grade individuals displayed complete teamwork, working together in perfect synchronization, to create something whole. FANTASTIC!”

- Mark Shelleman, Vocal Music Teacher, South Side Elementary, Central Dauphin School District (where the program premiered in 2016 and is being held again in 2017)

# Sustain



In 2016, the “Arts for All” Partnership, a partnership between The Foundation for Enhancing Communities (TFEC) and the Cultural Enrichment Fund (CEF), granted \$50,000 to 17 organizations.

This unique collaborative funding initiative aims to improve the efficiency and increase the overall impact of grant funding for arts programming in our communities by providing grants to local nonprofit organizations that conduct arts and cultural programming. “Arts for All” Partnership grants will increase access to the arts in the capital region by funding free public performances for families, ticket subsidy programs that fill houses, innovative programs that engage and build young audiences and educational outreach programs. Priority is given to programs that increase arts engagement and access among diverse audiences, underserved and/or economically disadvantaged communities.

Additionally, the “Arts for All” Partnership furthers each organization’s vision of ensuring the existence of a vibrant and diverse arts community in the capital region – an arts community which is accessible to all residents.



# Greater Harrisburg Foundation

Our Challenge for Giving: *Inspiring nonprofits to increase their capacity*

In 2016, the Greater Harrisburg Foundation's Challenge For Giving granted \$90,000 to 12 organizations. Coupled with the matching dollars, GHF's investment is bringing \$255,000 in new dollars to local nonprofits.

Our Challenge for Giving, a challenge grant initiative for the local nonprofit community, is GHF's commitment to award up to \$7,500 to increase the number of new private donors, reengage lapsed donors, and promote increased gifts from current donors. GHF cannot support the needs of our community alone; everyone needs to commit to making this region a vital and healthy community. Challenge Grants can be a powerful incentive to diversify and increase the number of donors who support the nonprofit organization.

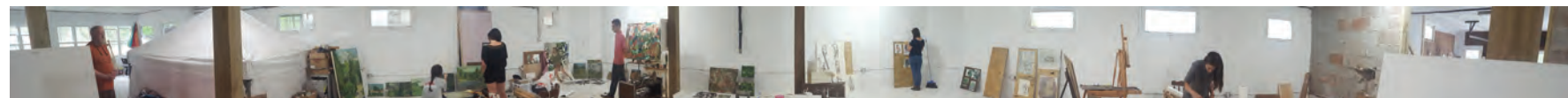
## Mount Gretna School of Art

In 2016, the Greater Harrisburg Foundation's Challenge for Giving awarded the Mount Gretna School of Art (MGSOA) a \$7,500 grant. MGSOA is now entering its fifth year as a top-quality painting program, attracting students from colleges and universities throughout the region and nationwide. MGSOA now has many former students that are moving on to careers in the arts and developing paths as professional artists. Funding from this grant will help launch the "Four Pillars" artist residency, a new nonprofit service of MGSOA that will feature deserving MGSOA alumni and non-alumni artists each summer. This will strengthen the school's bond to its alumni and cement their connections to Mount Gretna itself. Community supporters will be proud to see beneficiaries of the school return to report on the positive impact MGSOA has had on their careers as artists and give back to the summer cultural experience in Mount Gretna.



"Our intensive residential summer art school has proven transformative and life changing to students since 2013, the perfect blend of fellowship and rigor. As our students gradually work to build their reputations as artists, the "Four Pillars" artist residency will provide an opportunity for them to connect with audiences and build their early careers."

- Jay Noble, Executive and Artistic Director, MGSOA



# Greater Harrisburg Foundation

## Early Childhood Education Strategic Initiative

*A focus on kindergarten readiness*

### Mission

The mission of the Early Childhood Strategic Initiative is to explore and invest in programs that focus on kindergarten readiness for children ages 3 to 5-years-old who are not in pre-school settings and may, for multiple reasons, have barriers to accessing those services.

### Grantmaking

Phase One of the Early Childhood Strategic Initiative consisted of grantmaking to fund pilot research to determine programmatic priorities.

Phase Two of the Early Childhood Strategic Initiative is a four year grant that will serve to connect families to early childhood services and resources by ensuring that quality early childhood services and resources exist and are accessible to children and their families, educators, and the greater community.

Through these initiatives, TFEC seeks to leverage this effort to ultimately improve access to quality early learning opportunities for all children in South Central Pennsylvania.

### Summary of Grant Work

#### Phase One

For more than a year, the Greater Harrisburg Foundation has worked with School Readiness Consulting to conduct an in-depth needs assessment that documents the existing opportunities and challenges faced by families with young children accessing early childhood education, including cultural, economic, and geographic barriers. To achieve this, TFEC engaged four community partners who gathered community educators, local and regional stakeholders, and caregivers whose pre-school aged children were not currently accessing services or who had recently experienced challenges while attempting to access services. The four community partners included the Lebanon Valley Family YMCA, Perry County Literacy Council, the Salvation Army Harrisburg Capital City Region, and the YWCA Carlisle.

TFEC plans to present the findings of its Early Childhood Needs Assessment, and introduce a new correlating grant opportunity in spring 2017.

#### Phase Two

Phase Two will directly serve to act upon the results discovered and recommendations made in conjunction with Phase One.



# Sustain



# Mechanicsburg Area Foundation

Established 1986

## A Regional Foundation

## Serving the Mechanicsburg Area

### Advisory Committee

Scott J. Christ, Chair	Linda Mohler Humes
John Anthony*	Parker H. Kuhns
Bob Carey*	Michael J. Malpezzi
Leslie Collins	Alan T. Vandrew
Tita Eberly	Murrel R. Walters III
Patricia Ferris	Gary Weber*
Dale A. Flor	Earnie Zimmerman
Mike Greenawalt#	L. Jeffrey Mattern, TFEC Board of
Patti Herring	Directors, Chair, ex officio

\*New in 2017  
#Term Expired in 2016

### Director Emeritus

Foster M. Berkheimer  
David Coover  
Charles E. Shields, Sr. (posthumously)

2016 Total Assets	2016 Total Grants
<b>\$4,889,576</b>	<b>\$236,304</b>
(6.04% of total TFEC assets)	(5.53% of total TFEC grants)



# The Alzheimer's Association



In 2016, the Mechanicsburg Area Foundation awarded the Alzheimer's Association a \$3,800 grant for their Sing for the Moment Choir. The Alzheimer's Association was founded in 1980 with a mission to eliminate Alzheimer's disease through the advancement of research, to provide and enhance care and support for all affected, and to reduce the risk of dementia through the promotion of brain health. As part of their mission, the Sing for the Moment Choir is a community outreach program that strives to help those dealing with the early stages of dementia and their care partners to enjoy music and socialize with other people living with Alzheimer's. Although the focus of the choir is social interaction, participants also benefit from the wellness aspects of singing, such as reduced stress and improved mood.



“This Sing for the Moment Choir is a wonderful social engagement program which will benefit the well-being of those living with Alzheimer's disease/dementia, and their loved ones. The Alzheimer's Association is extremely grateful to the Mechanicsburg Foundation for this grant, which allows us to move forward with this project.”

- Olivia Maturano,  
Constituent Services Coordinator,  
the Alzheimer's Association



Pictured, from left to right, is Sing for the Moment Choir planning committee members Kerwin Stetler, Olivia Maturano, Leslie Amoros, and Gary Scicchitano. The Sing for the Moment Choir is currently recruiting singers. Please contact Olivia Maturano, Constituent Services Coordinator at 717-651-5020, ext. 2123 or [omaturano@alz.org](mailto:omaturano@alz.org) for more information.

# Sustain



## A Regional Foundation

## Serving Franklin County

### Advisory Committee

Nancy Glen, Chair	Charles G. Schlichter, Jr.
Harold L. Brake	David F. Spang
Henry J. Guarriello#	L. Jeffrey Mattern, TFEC Board of
Lee T. Harter#	Directors, Chair, ex officio
Dawn Keller	
Leroy S. Maxwell, Jr.	*New in 2017
John C. McKenzie	#Term Expired in 2016
Carolyn Miller#	
John Rotz*	

2016 Total Assets	2016 Total Grants
<b>\$8,777,561</b>	<b>\$330,872</b>
(10.84% of total TFEC assets)	(7.75% of total TFEC grants)



# Alexander Hamilton Memorial Free Library



In 2016, the Franklin County Foundation awarded a \$2,900 grant to the Alexander Hamilton Memorial Free Library for Novel Reels, an innovative pilot program which leverages a recent renovation of a local movie theater to drive traffic to the library located just down the street. The program is a public/private partnership between the Alexander Hamilton Memorial Free Library, the Waynesboro Community Theater Project and High Rock Holdings. The program offers three top-rated movies free to the public, along with free popcorn, candy, and soda. Participants will also receive a free copy of the novel that inspired the

movie. Along with the book is a coupon redeemable at the library for another free book related to the first by author, series, or subject. The books also include activity cards and discussion points with the intent of creating an open dialogue in the home. The goal of the program is to support literacy by distributing books and driving traffic to the library where patrons are introduced to the many services the library provides. The 2017 movies are *The Hobbit*, *Mrs. Peregrine's Home for Peculiar Children*, and *How to Train Your Dragon*.



"I am so thrilled to partner with local organizations and offer such a unique program to our community. Getting books into the hands of our patrons and giving them the opportunity to see the movies will be so much fun."

- Lori Milach, Director, Alexander Hamilton Memorial Free Library

# Sustain



# Perry County Community Foundation

Established 1987

A Regional Foundation

Serving Perry County

## Advisory Committee

L. Jeffrey Mattern, Chair	Linda Kutz*
Anne Chappelka	George L. Lyter, Jr.
Suzanne Dell	Harriet Magee*
Lenus A. Haines	Lori McClellan
Allen E. Hench#	Lorri McNaughton*
Dennis Hocker	Lane Partner
Marel King	Dan Rice*
	John J. Zogby

## Honorary Members

Joan Holman^  
Hon. William Moore

\*New in 2017  
#Term Expired in 2016  
^Deceased

2016 Total Assets	2016 Total Grants
<b>\$4,476,744</b>	<b>\$207,382</b>
(5.53% of total TFEC assets)	(4.86% of total TFEC grants)

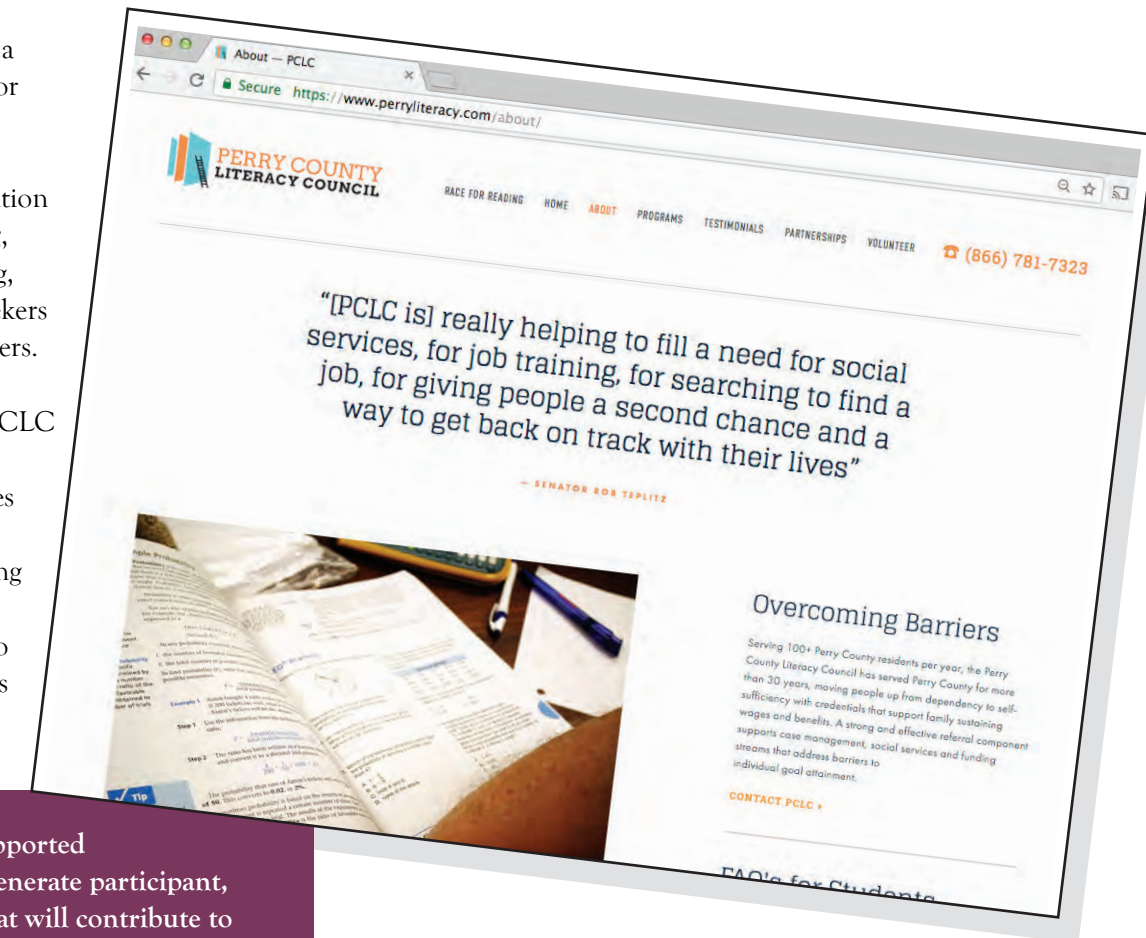


# Perry County Literacy Council



In 2016, the Perry County Community Foundation awarded a \$2,500 grant to the Perry County Literacy Council (PCLC) for redevelopment of its website.

The Perry County Literacy Council has provided adult education programs since 1984, offering adult basic one-to-one tutoring, high school equivalency preparation classes and onsite testing, and the PCLC Career Pathway Program that prepares job seekers for work with certifications and credentials valued by employers. A collocated workplace provides opportunities for on-the-job training and employment in the customer service industry. PCLC leads a one-stop satellite site where unemployed, dislocated, and disabled adults and youth can access employment services aligned with the PA CareerLink® system. In 2016, PCLC reconstructed its website. This beautifully designed, welcoming site, attracts and facilitates the needs of participants, donors, and partners. Additionally, it reflects PCLC's commitment to human-centered service delivery, and rural access to programs and services at a single point of contact.



“This capacity building grant has supported a sustainable asset that promises to generate participant, donor, and partnership outcomes that will contribute to growth and expansion.”

- Kathleen Bentley, Executive Director,  
Perry County Literacy Council

Visit <https://www.perryliteracy.com/>  
to see more of their brand new website.

# Sustain



A Regional Foundation

Serving the Camp Hill Area

## Advisory Committee

Barbara McLemore, Chair	Thomas M. Johnston
Nancy A. Besch	David W. Reager
Henry Cohen	Charlene Silvis*
Norma Gotwalt*	Jill Williamson
Greg Gunn*	Richard N. Woodard, Previous Chair
Dennis Lebo	L. Jeffrey Mattern, TFEC Board of Directors, Chair, ex officio

\*New in 2017

2016 Total Assets

**\$690,374**

(0.85% of total TFEC assets)

2016 Total Grants

**\$43,127**

(1.01% of total TFEC grants)



# CONTACT Helpline

In 2016, the Camp Hill Community Foundation awarded CONTACT Helpline a \$500 grant for its “Information and Referral” program, a program which served 2,754 callers from April 2016 to December 2016. Through this award, CONTACT Helpline was able to provide Camp Hill residents with a 24-hour listening, health and human service information, and referral service hotline that may be reached by dialing 3 easy-to-remember digits 2-1-1. Callers were provided support for their emotional needs through non-judgmental, active listening and were able to learn about community resources to assist with food, clothing or heating needs. Awarded funds were applied to the cost of telephone expenses so that services could continue to be offered at no cost to all consumers.

CONTACT  
**Helpline**  
Dial 211



“We were able to assist more Cumberland County callers than the previous year. Awarded funds covered the telephone costs for those callers, making accessing services easier. The number one reason someone called was for emotional support. The number one basic need request was for rent assistance. It also seemed that the election elevated caller stress levels, as many callers expressed concerns over the election process. Many continue to struggle to make ends meet and were able to find direction for assistance by calling 2-1-1. With the support of the Camp Hill Community Foundation, we were truly able to meet the needs of our community through one call at a time.”

- Kelly Gollick, Executive Director, CONTACT Helpline

*Sustain*



# Dillsburg Area Foundation

Established 2004

A Regional Foundation

Serving the Dillsburg Area

2016 Total Assets

**\$30,831**

(0.04% of total TFEC assets)

2016 Total Grants

**\$1,000**

(0.02% of total TFEC grants)



## Melvin J. and Alice Gayle Reeder Scholarship



Emily Fanton is the Melvin J. and Alice Gayle Reeder Scholarship recipient for the 2016-2017 academic year.

Emily is currently majoring in International Business at Messiah College. She enjoys Messiah because the faculty is personable and genuinely aim to invest in their students. She appreciates that the faculty challenge students to look through a lens of faith as they learn both in and out of the classroom. Emily will cherish her Messiah College experience for a lifetime.

After graduation, Emily hopes to utilize her degree working for an international company either here or abroad. She feels being able to use her degree to contribute to a nonprofit or civic organization impacting the community in a positive way would be a blessing.

“Having this scholarship is such a privilege as it is a constant reminder of my roots. It has allowed me to take a piece of the Dillsburg community with me to college; what could be better? I would like to thank the Reeder family for their confidence, belief, and generosity.”



“After participating in numerous mission’s trips growing up, I have developed a heart for missions. I love serving people all over the world because I know each person has potential, regardless of their economic or social status. I receive the greatest joy when I can see someone through God’s eyes; it puts life in perspective.”

- Emily Fanton  
Scholarship Recipient

# Sustain



## Statement of Financial Position *as of December 31, 2016 and 2015*

ASSETS	2016	2015
Cash and investments at market value	\$ 68,473,089	\$ 61,409,317
Receivables	1,834,794	1,767,020
Prepaid expenses	25,567	28,221
Property and equipment (net)	42,537	9,763
Split interest agreements	10,593,236	9,488,821
<b>Total Assets</b>	<b>80,969,223</b>	<b>72,703,142</b>
<b>LIABILITIES AND NET ASSETS</b>		
Accounts payable	8,370	26,256
Grants payable	951,488	822,489
Liability to resource providers	4,991,177	4,610,000
Liabilities under split interest agreements	6,038,941	5,555,573
<b>Total Liabilities</b>	<b>11,989,976</b>	<b>11,014,318</b>
Unrestricted	61,612,884	54,849,657
Temporarily restricted	7,366,363	6,839,167
<b>Total Net Assets</b>	<b>68,979,247</b>	<b>61,688,824</b>
<b>Total Liabilities and Net Assets</b>	<b>\$ 80,969,223</b>	<b>\$ 72,703,142</b>



## Statement of Activities *as of December 31, 2016 and 2015*

SUPPORT AND REVENUES	2016	2015
Contributions	\$ 7,068,578	\$ 6,867,456
Dividend and interest income	1,663,166	1,496,790
Net gain (loss) on long-term investments	4,791,952	(1,929,316)
Reimbursements and other	1,088,465	(153,907)
Split interest agreements	119,964	69,965
<b>Total Support and Revenues</b>	<b>14,732,125</b>	<b>6,350,988</b>
<b>EXPENSES</b>		
Grants and program services	6,220,019	6,121,609
General, administrative and fundraising	1,221,683	1,234,117
<b>Total Expenses</b>	<b>7,441,702</b>	<b>7,355,726</b>
<b>Change in Net Assets</b>	<b>7,290,423</b>	<b>(1,004,738)</b>
<b>Net Assets, January 1</b>	<b>61,688,824</b>	<b>62,693,562</b>
<b>Net Assets, December 31</b>	<b>\$ 68,979,247</b>	<b>\$ 61,688,824</b>

# Historical Investment Performance



## Annual Investment Returns<sup>1</sup>

Year	Model E <sup>5</sup>	Model A <sup>6</sup>	Model F <sup>7</sup>
1996	19.6%	18.8%	—
1997	27.6%	22.0%	—
1998	23.4%	17.4%	—
1999	21.3%	16.3%	—
2000	-11.2%	-5.1%	—
2001	-8.8%	-4.2%	—
2002	-19.3%	-10.9%	—
2003	34.1%	24.2%	—
2004	16.0%	12.0%	1.6%
2005	8.6%	6.9%	1.1%
2006	19.0%	14.8%	4.7%
2007	4.3%	4.8%	6.1%
2008	-39.0%	-27.1%	0.1%
2009	31.1%	24.9%	8.4%
2010	18.5%	15.0%	6.4%
2011	-2.9%	-2.0%	3.7%
2012	16.7%	13.6%	5.7%
2013	32.0%	21.0%	-2.7%
2014	8.4%	5.9%	2.8%
2015	-0.9%	-1.0%	-0.6%
2016	13.5%	10.5%	3.3%
<b>Standard Deviation<sup>2</sup></b>	<b>18.5%</b>	<b>13.1%</b>	<b>3.2%</b>

1 Results are net of fees included in the mutual funds but before TFEC's fee for investment and fund management and are as of 12/31/16.

2 Standard deviation is a statistical measurement of the dispersion of investment returns over the 21-year period. Standard deviation does not indicate how investments actually performed, but merely indicates the volatility of their returns over time. A higher standard deviation indicates a wider dispersion of past returns and thus greater historical volatility.

3 Benchmark returns are unmanaged and do not incur fees. In 2004, the benchmarks were adjusted because small cap and international allocations were increased. In 2003 and prior years, the Model E equity benchmark was 70% S&P 500, 20% Russell 2000 and 10% MSCI-EAFE, and Model A's benchmark was 49%, 33% and 7%, respectively.

4 To minimize market fluctuations, the fixed income component is invested in funds that focus on high quality, intermediate term bonds. It is heavily weighted to U.S. Government bonds.

5 100% Equities

6 70% Equities & 30% Fixed Income

7 100% Fixed Income

## Average Annual Returns<sup>1</sup> vs. Benchmarks<sup>3</sup>

Year	Model E <sup>5</sup>	Benchmark	Model A <sup>6</sup>	Benchmark	Rank	Percentile	Year	Model F <sup>7</sup>	Benchmark
1 yr	13.5%	13.0%	10.5%	9.9%	3 of 145	98%	1 yr	3.1%	2.7%
3 yrs	6.8%	6.3%	5.0%	5.0%	3 of 138	98%	3 yrs	1.8%	3.0%
5 yrs	13.4%	13.0%	9.7%	9.6%	1 of 132	100%	5 yrs	1.6%	2.2%
10 yrs	6.1%	5.8%	5.5%	5.6%	1 of 114	100%	10 yrs	3.3%	4.3%
Since Inception (21 yrs)	8.4%	8.1%	7.6%	7.6%	2 of 53	96%	Since Inception (13 yrs)	3.1%	4.2%
Benchmarks	55% S&P 500, 25% Russell 2000, 20% MSCI-EAFE		34% S&P 500, 19% Russell 2000, 17% MSCI-EAFE, 30% BarCap US Aggregate Bond		Fiscal and Administrative Officers Group (FAOG) Community Foundation Survey 4th Quarter 2016		Benchmarks	100% BarCap US Aggregate Bond	



# Investing with TFEC

## Robert Dolan, Investment Advisory Committee Chair

Another year has come and gone and it is a wonderful time to reflect back on the year and to review our investment history.

From an investment standpoint, 2016 started off to be ideal. We had ten months of steady, positive growth with relatively minor fluctuations which was creating a nice and steady return of between 6% and 7% for both Models A and E. Then there was an election, which in the view of most political experts resulted in an upset. On election night, as the results were gradually emerging, the futures market for equities



dropped significantly. Investment experts predicted 200 - 300 point drops for the DJIA when it opened on Wednesday morning. When the market did open, it dropped, but by less than 60 points. Within the first hour of trading it was back in positive territory. It continued upward through the end of the year, closing for the year at 19,762.

Through the entire year, including this very unexpected year-end run up, our asset allocation served us well. By year-end, the Model E return reached 13.5% for the year and Model A earned 10.5% making 2016 a very successful year for TFEC. The benchmarks for the Models were 13.0% and 9.9% respectively, so once again we outperformed our benchmark by about .5% — exactly as we had set out to do. This is a very good result for the short term.

We also have very good results for the long term, which is our primary objective in foundation investing. In the 21 years since inception of our total return investing philosophy, we have outperformed our benchmark for equity investing. Model E has returned 8.4% per year over that 21-year time, while its benchmark was at 8.1%. For our Model A, which blends equity and fixed income, our return exactly matched the benchmark at 7.6%. We are extremely proud of our long-term performance.

So with a positive 2016, what does 2017 look like? The economy appears strong, our new President is intent on making it stronger; however, his methods for doing so are very different from his predecessors. So while TFEC is in place for steady growth these new methods of twitter, “America First” and executive orders will likely add much more volatility to the mix, but not change the underlying strength and positive direction of the economy. If this is correct, our discipline will become more important than ever. We are committed to that discipline, our assets will remain deployed as they have been and we will continue to follow our well-tested and positively proven investment philosophy.

TFEC’s Assets <i>as of December 31, 2016</i>		
Total Assets	\$80,969,223	100%
Advised Funds (Nonpermanent)	10,890,072	13.45%
Advised Funds (Permanent)	13,601,257	16.80%
<b>Advised Total Assets</b>	<b>24,491,329</b>	<b>30.25%</b>
Agency Funds	6,753,117	8.34%
Area of Interest Funds	4,991,547	6.16%
Projects	1,779,997	2.20%
Restricted Funds	15,445,496	19.08%
Scholarship Funds	10,224,119	12.63%
Split Interest Agreements (Trusts)	11,579,098	14.30%
Unrestricted Funds	5,704,520	7.04%

## Investment Models 4

TFEC has four different models you can choose from to invest your fund: Model E, Model F, Model A, and Model M.

- Model E: 100% Equities
- Model F: 100% Fixed Income
- Model A: 70% Equities & 30% Fixed Income
- Model M: 50% Money Market & 50% Very Short-Term Corporate Notes

When you establish a fund, you can select a fund investment mix among these four investment models. Each model is structured to have a different performance benchmark and volatility measure.



## Average Annual Returns vs. Benchmarks 1 year

Results are net of fees included in the mutual funds but before TFEC’s fee for investment management and fund administration and are as of 12/31/16.

- Model E: 13.5%; Benchmark: 13.0%
- Model A: 10.5%; Benchmark: 9.9%
- Model F: 3.1%; Benchmark: 2.7%

Please see page 35 for the complete list of investment performance.

## Total Return Philosophy 1996

Since 1996, TFEC has invested assets according to “Total Return”. A total return philosophy treats all returns on investments — interest, dividends, realized and unrealized capital appreciation — as additions to principal. The spending policy then allows for more predictable distributions over the long-term and ongoing grant recipients are able to rely upon a relatively stable income stream.

## Passive vs. Active Management S&P 500

S&P 500 index funds, a passive investment index, have outperformed 80% of the managed general equity mutual funds over the past twenty years. Similarly, the mid-cap and small-cap index funds have outperformed actively managed funds of similar investment guidelines. Part of this performance is due to lower fees charged against indexed funds, low commissions paid on security transactions, and little asset turnover.

## Investment Strategy 21 years

In 1996, TFEC adopted a disciplined, passive investment strategy which suggests that we not try to outperform the market in any given year. In order to realize market returns and maintain diversification at the lowest possible cost, TFEC invests in no-load, low-expense mutual funds. These funds, from reputable companies such as Vanguard and Dimensional Fund Advisors, are held within separate asset-class pools.



# New Funds

## Agency Funds

### Silver Spring Presbyterian Church Buildings and Ground Fund

This fund was established to maintain the Church's historic buildings and campus.

### Silver Spring Presbyterian Church Fund for the Living Word

This fund was established to ensure that the Word we hear today at Silver Spring Presbyterian Church will be forever preached within this gifted place.

## Area of Interest Fund

### Patricia H. Ferris Family Fund

This fund was established to support programs that serve families with children that include a food/nutrition component to their services in the Mechanicsburg Area.

## Committee Advised Funds

### The Bank of Landisburg Fund

This fund was established to support nonprofit organizations that focus on arts and culture, education, and human service, serving the residents of Perry County.

### The Children's Home Foundation Fund

The Children's Home of Harrisburg formed by the merger of the Children's Industrial Home Association of Harrisburg and the Nursery Home of Harrisburg in 1923. The original purpose of the Home was "the amelioration

and improvement of the condition of children who are destitute and indigent. The institution operated as a home for children and as an adoption placement service for children until 1947, when the home was closed and the foundation was formed. Over the intervening years, The Children's Home Foundation has operated as a private foundation and has distributed over \$500,000 to charities serving children in the tri-county area. In 2016, the Board of Directors determined that to achieve operating efficiencies and flexibility, The Children's Home Foundation would dissolve as a private foundation and transfer its assets to become a fund of The Foundation for Enhancing Communities. Grants will be given to projects and programs that aid economically disadvantaged children in Dauphin, Cumberland and Perry counties in the areas of human services, education, cultural enrichment and the arts with special emphasis on mentally or physically challenged or at-risk children.

## Donor Advised Funds

### Christ/Sloand Family Fund

This donor advised fund was established in 2016 by the families of Scott and Susan (Sloand) Christ. The fund goal is to support local and national health and human service organizations with special meaning to both families including, but not limited to, Parkinson's and Lupus Foundations, American

Heart Association, and cancer affiliated groups.

### Robert Lee Gingerich Memorial Fund

A native of the Harrisburg area, Bob Gingerich was supportive of youth, music, and education. The Robert Lee Gingerich Memorial Fund was established to allow the donors to support nonprofit organizations, such as the Gettysburg College Music program and the Humane Society.

### Neelima and Mukul Parikh Fund

This fund is a private nonprofit charitable foundation to promote educational, healthcare, religious/spiritual, and community service projects.

## Restricted Funds

### Gerry Britcher Fund

This fund was established through the estate of Raymond W. Britcher, in memory of his mother, Geraldine Janet Guhl Britcher, a life-long resident of New Cumberland. The purpose is to make funds available to the New Cumberland Olde Town Association to be administered as part of its existing scholarship program, with one or more scholarships to be given in memory of George and Carrie Guhl, Raymond's maternal grandparents.

### Pete Britcher Fund

This fund was established through the estate of Raymond W. Britcher in memory of his father and paternal grandparents, and is named

# Established in 2016

for his father. The purpose is to make funds available to the Perry County Fair Board to be administered as part of its existing scholarship program, with one or more scholarships to be given in memory of Frank and Grace Britcher, Raymond Britcher's paternal grandparents.

### New Cumberland Fire Department Fund

This fund was established through the estate of Raymond W. Britcher to benefit the New Cumberland Fire Department.

### Bill Lehr Fund for Arts and Education

This fund was established to support arts organizations such as the Susquehanna Art Museum, Harrisburg Symphony Orchestra, and Whitaker Center for Science and the Arts, among others.

### Beverlee Balch Lehr Fund #3

This fund was established to support organizations that Beverlee cares about, such as the YWCA of Greater Harrisburg, Central Pennsylvania Food Bank, and Lebanon Valley College, among others.

### Lesher IRA Fund

This fund was established to support organizations the Lesher's care about, such as the Cedar Foundation, the Lebanon Community Library Association, the Lebanon Valley Family YMCA, and Lebanon County Christian Ministries, among others.

### Ronald I. and Lenora H. Stern Fund

This fund was established to support nonprofit organizations of the Stern's choice such as Messiah College, New Hope Ministries, the Mechanicsburg Area Foundation, a regional foundation of The Foundation for Enhancing Communities, Reach Beyond and others.

## The Polar Bear Foundation | Agency Fund



This fund was created to enrich the academic, athletic, cultural, and artistic development of the students of the Northern York County School District. Since its inception in 2007, the Polar Bear Foundation has donated more than \$200,000.00 through grants and scholarships for the benefit of the students in the district. In 2016, the Polar Bear Foundation created an endowment fund to establish a self-sustaining model to ensure financial stability.

"The Board of the Polar Bear Foundation wanted to create an endowment fund to guarantee the existence of the Foundation forever. We knew that many donors wanted to ensure that their contribution would continue to support the students in our school district for years to come. We explored a variety of options and decided to work with TFEC based upon their many years of helping organizations like ours establish a successful endowment."

- Timothy J. Colgan, Esquire, Polar Bear Foundation President

# Sustain



# New Projects

TFEC manages projects that provide charitable benefits for the community; through this fiscal sponsorship, gifts to a project are tax-deductible.

Through a project agreement, TFEC can pay for eligible expenses related to the project’s goals and the net proceeds can be used to create a charitable fund at TFEC or be distributed to another nonprofit organization. TFEC provides objective fiscal oversight and expertise in order to ensure legal and accounting compliance. TFEC manages 70 projects totaling more than \$1.7 million in assets (12/31/16). Grants, totaling \$591,251, were made in 2016 from these projects to various nonprofit organizations such as Penn State University College of Medicine, Four Diamonds Fund, YWCA Greater Harrisburg, and the Harrisburg Symphony Association Fund.

## Center for the Study of Human Trafficking in South Central Pennsylvania

The charitable purpose of the project shall be to educate the public concerning all aspects of human trafficking from a global to local perspective.

## Marques Colston Foundation

The charitable purpose of the project shall be to identify and support individuals and community organizations focused on positively impacting communities through health and wellness and education initiatives.

## Harrisburg Firefighters’ Special Operations Foundation

The charitable purpose of the project shall be to provide financial support for equipment, training, and apparatus to improve and/or continue the response capabilities of emergency services that respond to Harrisburg City, Dauphin County, the South Central Region, the Commonwealth of Pennsylvania, and areas beyond as requested.

## Loaves of Love

The charitable purpose of the project shall be to provide and maintain a Food Bank for individuals and families impacted by human immunodeficiency virus (“HIV”) and acquired immunodeficiency syndrome (“AIDS”).

## MP Cares

The charitable purpose of the project shall be to provide financial assistance and support to local organizations, projects and causes to help the betterment of our neighborhoods and communities.

## Susquehanna Civil Benevolence Fund

The charitable purpose of this project is to provide a means by which Susquehanna Civil employees can: (1) provide emergency benevolent aid to fellow employees and (2) contribute to local charities.

## “Totally You”

The charitable purpose of this project shall be to support the Children’s Miracle Network at Penn State Children’s Hospital at Penn State Health Milton S. Hershey Medical Center so that patients will have a better quality of life and better treatment outcomes.



# Established in 2016

## Team Scott Inspire



The charitable purpose of the project shall be to unite the community as one family with a “Desire to Inspire Kindness” while actively supporting & raising funds for outreach programs that provide vital services for youth facing real life struggles.



“We had the ‘Desire to Inspire’ our children to spread kindness in their community. Along the way, as we reached out into the community, we realized this is bigger; we are one family but we can lead the way by setting an example of inspiring kindness. We created Team Scott Inspire, and approached TFEC because it was a perfect fit. We could focus on our purpose instead of spending time and energy on politics and paperwork like forming a board and accounting for the funding. Upon doing so, we were able to instantly put our efforts into creating our own outreach program to help students facing real life struggles. Students Achieving Success, a lunch and learn program, provides accountability, motivation, and vision to high school students that are committed to achieving academic success despite their current situation.”

-Scottie and Rachelle Scott, Co-Founders of Team Scott Inspire

# Sustain



# Nonprofit Services

TFEC offers foundations and nonprofit organizations several options to advance their mission today and tomorrow. Furthermore, TFEC provides expertise to nonprofit organizations to help make smart, safe, and secure financial decisions to achieve their strategic goals.

## Management Services

TFEC provides an array of services for nonprofit organizations or private foundations. Through this contractual relationship, a personalized package including options from accounting services to investment management is created, providing efficient financial administration. TFEC currently administers 15 management services agreements, with assets totaling \$41.2 million (12/31/16).

## Agency Funds

An Agency Fund is an endowment fund established by a nonprofit organization with the income benefiting their programs in perpetuity. The process of building a successful Agency Fund requires commitment over many years from the entire nonprofit organization with a steadfast dedication to the principle of investing for the future. Income earned from the fund can be reinvested for compound growth or can provide a predictable income stream. Fund income lessens the pressure to raise current operating dollars and helps to smooth the ups and downs of economic business cycles. Additionally, an Agency Fund sends a positive message to donors: the organization has achieved a key measure of financial stability and intends to carry out its mission for generations to come.



### Central Pennsylvania Food Bank

“Our experience with TFEC has been nothing short of exceptional. We knew in order to achieve our Bold Goal to End Hunger, establishing new partnerships and making new friends was vital. A fund with TFEC allows donors the flexibility to give to the Central Pennsylvania Food Bank in a whole new way.”

- Jennifer Powell, Director of Development,  
Central Pennsylvania Food Bank



### Silver Spring Presbyterian Church Buildings and Ground Fund Silver Spring Presbyterian Church Fund for the Living Word

“Our goal was to provide financial stability for the future of Silver Spring Presbyterian Church. The Foundation for Enhancing Communities came highly recommended from some of our church members and from outside community contacts. After meeting with their staff, we knew that they were the right fit to help us achieve our goal.”

- Gary Karkuff, Finance Committee Co-Chair, Silver Spring Presbyterian Church

# 2017 Board of Directors



#### Standing (left to right):

Spencer G. Nauman, Jr., Esq.  
TFEC General Counsel  
Robert J. Dolan, ASA  
Robert E. Caplan, CFA  
Kimberly K. Schaller  
Bony R. Dawood  
Marilyn E. Arzon  
David F. Spang

#### Seated (left to right):

Richard D. Spiegelman  
Dolly M. Lalvani, Assistant Treasurer  
Karen F. Snider\*  
L. Jeffrey Mattern, Chair  
Michael R. Gillespie, Treasurer  
Tita Eberly, Assistant Secretary

#### Not Pictured

Dr. Carolyn Dumaesq, Vice Chair  
Neal S. West, Esq., Secretary  
Glenn P. Heisey  
Kathy Pape

\*Our dear friend, Karen Snider, passed away in early 2017. Karen was a member of our Board of Directors from 2005 - 2011 and returned for another term in 2013. We are indebted to her for her leadership. We will miss her.

#### Director Emeriti

John M. Aichele*	Raymond L. Gover	Claude E. Nichols, M.D.*	Elsie W. Swenson*
William H. Alexander	Lois Lehrman Grass	John S. Oyler, Esq.	Mary A. Simmonds, M.D.
Tita Eberly	William Lehr, Jr.	Velma A. Redmond, Esq.	Nathan H. Waters, Jr., Esq.
Gerald L. Hempt	Jacqueline Little	John M. Schrantz	Jonathan Vipond, III, Esq.
Ellen Brody Hughes*	Harold A.B. McInnes	John McD. Sharpe, Jr., Esq.	Mary Webber Weston
		Conrad M. Siegel	

\*Deceased

# Sustain



# 2017 Standing Committees

## Asset Development Committee

Patricia (Tita) Eberly, Chair  
Nancy Glen  
Bob Haigh  
L. Jeffrey Mattern  
Barbara McLemore  
Mike Murtha  
Joshua Smith  
David F. Spang

## Audit Committee

Glenn P. Heisey, Chair  
Steven M. Hoffman, CPA  
Dolly M. Lalvani  
Kenneth E. Lehman  
William Lehr, Jr.

## Communications Committee

Kimberly K. Schaller, Chair  
Lynn Burkholder  
Kristen Nguyen  
Dr. Jeffrey Ritchie, Ph.D.  
Meghan Skelly  
Adam Vasquez

## Finance and Administration Committee

Michael R. Gillespie, Chair  
Dorothea Aronson  
Robert E. Caplan, CFA  
Robert J. Dolan, ASA  
Dolly M. Lalvani

## Grantmaking Committee

Richard D. Spiegelman, Chair  
Marilynn R. Abrams  
Marilyn E. Arzon  
Jennifer N. Baar  
Dr. David Bronstein  
Linda A. Hicks  
Devin Q. Langan  
Renee L. Lieux  
David B. Skerpon

## Human Resource Committee

Carolyn Dumaresq, Chair  
Marilyn E. Arzon  
Glenn P. Heisey  
L. Jeffrey Mattern

L. Jeffrey Mattern, Chair of the Board of Directors, serves as ex officio on all committees.

## Investment Advisory Committee

Robert J. Dolan, ASA, Chair  
Robert E. Caplan, CFA  
Frederick D. Fischer  
Howard Hamann  
Glenn P. Heisey  
Kenneth E. Lehman  
William Lehr, Jr.  
Peter J. Ressler, Esq.  
Conrad M. Siegel, FSA  
Richard D. Spiegelman  
Jonathan Vipond, III, Esq.

## Nominating Committee

Neal S. West, Esq. Chair  
L. Jeffrey Mattern  
Velma A. Redmond, Esq.  
Jonathan Vipond, III, Esq.

# 2017 TFEC Team



### Standing (left to right):

Jennifer Strechay, *Program Officer for Community Investment*  
Leslie Fick, *Program Manager, Parents & Partners*  
Brigid McDougall, *Asset Development & Project Officer*  
Mark Bradshaw, *Administrative Assistant*  
Jennifer Kuntch, *Communications Officer*  
Brandon Tressler, *Financial Services Associate*  
Allison Brubaker, *Asset Development & Scholarship Officer*  
Jeanne Predmore, *Program Manager, Parents & Partners*

### Seated (left to right):

Heather LaManna, *Executive Assistant*  
Kirk C. Demyan, *Vice President & Chief Financial Officer*  
Janice R. Black, *President & CEO*  
Jennifer Doyle, *Vice President of Development & Community Investment*  
Jim Martin, *Senior Financial Services Associate*  
Faith Elmes, *Scholarship Associate*

## Consultants

Conrad Siegel, FSA, Conrad Siegel Actuaries, Consulting Actuary and Founder  
Brian E. Hess, The ENVISION Group, Inc.  
WebpageFX, Website Support  
IntermixIT, IT Support  
Maher Duessel, Auditor  
Spencer G. Nauman, Jr., Esq., Nauman, Smith, Shissler & Hall, LLP, General Counsel

# Sustain



# *Dream Create Sustain*

## **Our Mission**

Inspiring giving by partnering with donors to achieve their charitable goals, and strengthening our local communities by investing in them now and for future generations.

## **Our Values**

- Inclusion** | We believe that all voices are vital for our region's future. We promote equity and embrace the diversity of individuals, ideas, and expressions.
- Stewardship** | We are prudent and grateful stewards of the assets, time, and talent entrusted to us.
- Endurance** | We value creating permanent legacies that support long lasting community change.
- Integrity** | In everything we do we will accept nothing but the highest standards of honesty, mutual respect, confidentiality, and transparency.



200 N 3rd St., 8th Fl • Harrisburg, PA 17101  
Tel: 717.236.5040 • Fax: 717.231.4463 • Email: [info@tfec.org](mailto:info@tfec.org)  
Connect with us: [www.tfec.org](http://www.tfec.org)



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