

the Foundation

for Enhancing Communities

THE INSIDER

QUARTERLY UPDATE FROM THE INVESTMENT ADVISORY COMMITTEE (IAC)

List of Committee Members	2
Meeting Dates	2
Message from Robert Dolan, IAC Chair	2
Investment Performance	2
Chart of Portfolio Percentages.....	3

DONOR

A Resolution to Do Good.....	4
What is Your Legacy?	4
Featured Scholarship Recipient	5
Solutions for Your Clients	5
Pay it Forward.....	5
Franklin County Foundation Update	5
Mechanicsburg Area Foundation Update	5
Camp Hill Area Community Foundation Update	5
Perry County Community Foundation Update	5
Support TFEC through Amazon Smile	5

COMMUNITY

2018 Nonprofit Innovation Awards	6
Project Homeless Connect Announcements	7
Emerging Philanthropist Program.....	7
Featured Grantee Organization	8
Upcoming Grant Deadlines	8
<i>Agency Fund Corner:</i> Ways to Give	8
<i>Agency Fund Corner:</i> Endowment Building Services	8

TFEC'S EARLY EDUCATION INITIATIVE

TFEC Forms Early Education Advisory Committee	9
Kindergarten Transition Conference Held	9

FALL 2017

Dream CREATE Sustain

Quarterly Update from INVESTMENT ADVISORY COMMITTEE

COMMITTEE MEMBERS

Robert J. Dolan, Chair
Conrad Siegel Actuaries

Robert E. Caplan, CFA
River Wealth Advisors

Frederick D. Fischer
Fischer Financial Services, Inc.

Howard Hamann
Hershey Corporation (Retired)

Kenneth E. Lehman
Lehman Volvo (Retired)

William Lehr, Jr.
Capital Blue Cross (Retired)

Conrad M. Siegel
Conrad Siegel Actuaries

Richard D. Spiegelman
Community Volunteer

Jonathan Vipond, III, Esq.
Buchanan, Ingersoll & Rooney, P.C.

MEETING DATES

January 17, 2017

April 18, 2017

July 18, 2017

October 17, 2017

All meetings take place at TFEC's offices located at 200 N. 3rd Street, 8th Floor, Harrisburg, PA 17101 beginning at 9:30am.

Fall has arrived!

The third quarter of 2017 is now history and the market continues its steady climb upward. The volatility of the market has been extremely low, which is of course comforting. Many people believe that we have moved up so long and so smoothly that an inflection point is near. The logic seems fine, but does that mean we are poised to go higher or doomed to go lower? Once again, the experts diverge on that point. But whether it is up or down in the short term, the long term trend is what is important.

The Dow Jones Industrial Average (DJIA) began the year at 19,819 and as I write this the DJIA is almost 23,000. We will continue with the same asset allocation model that takes advantage of this positive long term trend. The Committee will continue to review the investments of the fund, but no changes are anticipated at this time.

Have a great Fall season.

Bob



INVESTMENT PERFORMANCE

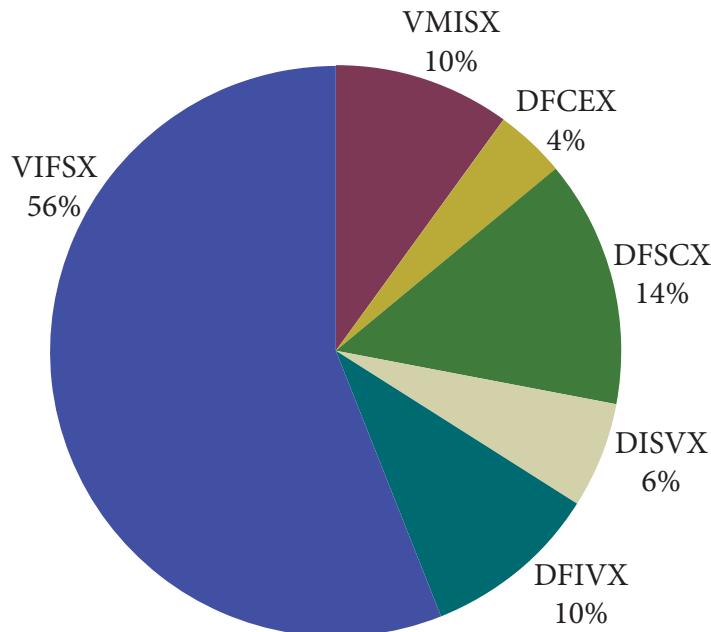
09/30/17 Returns are YTD & 1-3-5-10-13-21 Returns are as of 12/31						
Since Inception						
	09/30/17	1 Yr.	3 Yrs.	5 Yrs.	10 Yrs.	21 Yrs.
Model E	14.75%	13.5%	6.8%	13.4%	6.1%	8.4%
Benchmark*	14.09%	13.0%	6.3%	13.0%	5.8%	8.1%
*55% S&P 500, 25% Russell 2000, 20% MSCI-EAFE						
Model A	11.30%	10.5%	5.0%	9.7%	5.5%	7.6%
Benchmark*	10.86%	9.9%	5.0%	9.6%	5.6%	7.6%
*34% S&P 500, 19% Russell 2000, 17% MSCI-EAFE, 30% BARCAP U.S. Aggregate Bond						
Since Inception						
	09/30/17	1 Yr.	3 Yrs.	5 Yrs.	10 Yrs.	13 Yrs.
Model F	3.14%	3.1%	1.8%	1.6%	3.3%	3.1%
Benchmark*	3.14%	2.7%	3.0%	2.2%	4.3%	4.2%
*100% BARCAP U.S. Aggregate Bond						

Quarterly Update from

INVESTMENT ADVISORY COMMITTEE

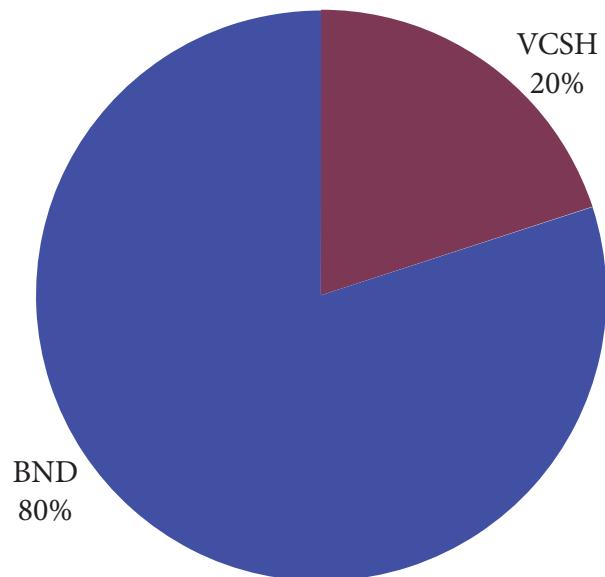
MODEL E PORTFOLIO PERCENTAGE

ASSET VALUE \$42,891,237



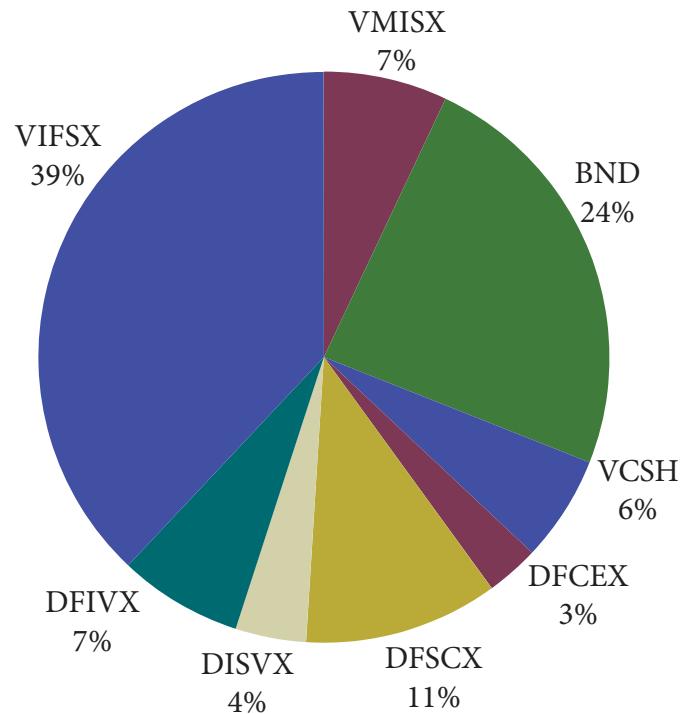
MODEL F PORTFOLIO PERCENTAGE

MODEL F ASSETS \$1,202,988



MODEL A PORTFOLIO PERCENTAGES

ASSET VALUE \$18,585,958



FUND LEGEND

DFA Emerging Markets	DFCEX
DFA International Value	DFIVX
DFA Micro Cap	DFSCX
DFA International Small Cap Value	DISVX
Vanguard Index 500	VIFSX
Vanguard Index Mid Capitalization	VMISX
Vanguard Short Term Corporate Bond	VCSH
Vanguard Total Bond Market Fund	BND

DONORS

A RESOLUTION TO DO GOOD

The end of a year can be a time of reflection; looking back on another year gone by, and thinking of all of the memories you've made with your family and friends. It can also be a time to think about the future, make plans and set New Year's resolutions. When it comes to your financial resolutions, TFEC can assist you and your financial advisor in developing planned gifts that meet your needs.

BEQUESTS The easiest planned gift is a bequest that directs specific amounts, assets, or a percentage of your estate to create a fund or add to an existing fund. A simple designation in your will is all that is needed.

CHARITABLE REMAINDER TRUSTS With this type of trust, you transfer assets that pay you or other beneficiaries an income for life or for a fixed term. When the trust matures, the remainder is used to establish a permanent fund in your name, with charitable distributions directed as you have chosen.

These are just two examples of planned gifts; TFEC can work with you to find the option that best fits your needs. Donors who make a planned gift or remember TFEC in their will are invited to become members of our 1920 Legacy Society. Members of the 1920 Legacy Society receive recognition in our Annual Report and on our website, invitations to all TFEC events, and a special luncheon and gift as gratitude for their planned gift. **Start planning your legacy today by calling Janice Black or Jennifer Doyle at 717.236.5040.**



WHAT IS YOUR LEGACY?

What matters most to you in life? Who or what had the greatest influence on your life? Why do you support the organizations you support? What advice do you want to leave to your family and friends?

Leaving a legacy is about more than just valuables and money. Earlier this year, TFEC's annual 1920 Legacy Society Luncheon featured speaker Sophie W. Penney, Ph. D., President, i5 Fundraising. Dr. Penney presented a compelling program on ethical wills, or legacy letters. According to **Celebrations of Life**, a legacy letter *is a way to share your values, blessings, life's lessons, hopes and dreams for the future, love, and forgiveness with your family, friends, and community.* An ethical will is not a legal document. Instead, *it is a heartfelt expression of what truly matters most in your life.*

AN ETHICAL WILL MAY BE ONE OF THE MOST CHERISHED AND MEANINGFUL GIFTS YOU CAN LEAVE TO YOUR FAMILY AND COMMUNITY.

For information on ethical wills/legacy letters, visit the Celebrations of Life website at <https://celebrationsoflife.net/ethicalwills/>. To start writing your own legacy letter today, **click here** for a worksheet that can help you get started.



CLICK HERE TO LEARN HOW TO START A FUND>>

DONOR

ZACHARY MOORE MUSIC MEMORIAL FUND SCHOLARSHIP

James Devor, 2016 & 2017 recipient of the Zachary Moore Music Memorial Fund Scholarship is our current featured scholarship recipient. A graduate of Central Dauphin East High School, James is currently a sophomore at West Chester University studying music education.

The Zachary Moore Music Memorial Fund Scholarship was established in 2014, in memory of Zachary Moore. The fund is intended to support music development as it was envisioned by Zachary, who dreamed of pursuing a non-traditional, innovative, and creative approach to bring forth music and help release the music he heard in his mind, body, and soul. [Click here to read more, make a donation, or learn how to start your own scholarship fund!](#)



SOLUTIONS FOR YOUR CLIENTS

TFEC can partner with you and your valued clients to expand and increase the benefits of their charity.

[LEARN HOW TO ASSIST YOUR CLIENTS>>](#)

PAY IT FORWARD.

Do you ever wonder what to buy the person who has everything? We have the perfect solution!

A Charitable Gift Certificate!

By giving one to a friend or loved one, you are:

- Giving the gift of charity, and
- Allowing the recipient to choose which nonprofit will benefit from the donation.



[LEARN HOW TO GIVE A CHARITABLE GIFT CERTIFICATE>>](#)

FRANKLIN COUNTY FOUNDATION (FCF)

FCF hosted a Grantee Presentation & 30th Anniversary Celebration on October 26, 2017 where they presented over \$65,000 in grants to their 2017 grantees. [Click here for more information on FCF.](#)

MECHANICSBURG AREA FOUNDATION (MAF)

MAF hosted their Annual Grant Presentation on November 9, 2017 where they presented nearly \$50,000 in grants to their 2017 grantees. [Click here for more information on MAF.](#)

CAMP HILL AREA COMMUNITY FOUNDATION (CHACF)

The Camp Hill Community Foundation is now the Camp Hill *Area* Community Foundation. [Click here for more information on CHACF.](#)

PERRY COUNTY COMMUNITY FOUNDATION (PCCF)

In 2018, four new members will be joining the Perry County Community Foundation Advisory Committee: Adam Britcher, Charlie Campbell, Todd Saner, and Pat Woolever. [Click here for more information on PCCF.](#)

SUPPORT TFEC

When you shop at smile.amazon.com,
Amazon donates.



[CLICK HERE TO LEARN HOW TO START A FUND>>](#)

the Nonprofit Innovation Awards

*honoring local
community service*

2018

Nomination Period Reopened

The 19th annual Nonprofit Innovation Awards honor local 501(c)(3) organizations of all sizes and their executives demonstrating innovation in their daily operations. Finalists will be recognized at an awards breakfast. Winners and runners-up in each of the categories will receive grants to continue their missions.

Nominations will be accepted in 5 categories*:

Brand Identity/Unique Marketing Campaign:

This nonprofit has been innovative in using a new marketing concept to attract financial support, volunteers and/or clients. This could include changing the nonprofit's name and/or direction to better serve its constituency.

Collaboration: This nonprofit has been successful in executing an innovative program with another organization(s) to accomplish a common goal. (The organization recognized in this category will be the one that sought out the resources.)

Management Operations: This nonprofit has been innovative in adopting sound management principles that have led to a significant increase in the organization's ability to meet its mission. This could include a new management plan to restructure an existing plan, procedure or technology that enables the organization to achieve cost savings and better employee-to-client communication.

Programs: This nonprofit has created and implemented a program or event locally to increase the effectiveness of its mission.

Nonprofit Leadership Excellence: This category identifies and recognizes an exemplary nonprofit leader whose accomplishments have advanced his/her organization and field of service. This nonprofit leader must manage an organization that serves the Central PA region of Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and/or York counties only.

* *An organization or executive may only be represented in one category.*

* *An Innovation that has been recognized as a winner or runner-up in a previous year is not eligible.*

Nomination Deadline: Monday, November 27, 2017

Visit www.CPBJ.com/events

to download the nomination form or submit your nomination online.



#CPBJNPIA

MAJOR SPONSORS:

MaherDuessel
Certified Public Accountants

 **PHILADELPHIA INSURANCE COMPANIES**

A Member of the Tokio Marine Group


First National Bank


**TEMPLE
UNIVERSITY
HARRISBURG NEST**

IN COOPERATION WITH:


**the
Foundation
for Enhancing Communities**


**LANCASSTER COUNTY
COMMUNITY
FOUNDATION**


**YORK COUNTY
COMMUNITY FOUNDATION**

Questions? Contact Olivia Berrigan at 717-323-5250 or oberrigan@cpbj.com.

A PROGRAM OF:
**CENTRAL PENN
BUSINESS JOURNAL**

COMMUNITY

PROJECT HOMELESS CONNECT ANNOUNCEMENT

In lieu of holding a one-day Project Homeless Connect event in 2017, CACH & Downtown Daily Bread are coordinating to make those “one-day-a-year” services go year-round!

For the last 7 years, Project Homeless Connect (PHC) has touched the lives of thousands of people in need – men, women, and children who were living on the streets, who were in shelters, and who were about to leave shelters.

At CACH's Annual Project Homeless Connect, CACH connected people with mainstream benefits, provided essential medical care, and removed barriers to accessing services. CACH deeply appreciates the hundreds of volunteers, schools, universities, sponsors, and organizations who gave their time and resources to make this annual event a success.

After much evaluation and discussion, CACH will not be holding PHC this year, but instead will be directing support to the Drop-in-Center operated by Downtown Daily Bread. CACH, along with its community partners and stakeholders, believes that providing services to people who are unsheltered should be an on-going practice. The services need to be accessible on a regular and long-term basis instead of just a once per year event, thus meeting the needs as they arise.

So, in place of PHC this year, CACH encourages Project Homeless Connect supporters, volunteers, sponsors, and contributors to learn more about the Drop-in-Center. The Drop-in-Center is a safe and secure area where people and families who are poor and homeless can come inside during the day to rest, connect to services, and socialize.

Amazingly, roughly 40 to 70 clients are already visiting the Drop-in-Center! Open 8:00am to 4:00pm Monday through Friday, the Drop-in-Center is staffed by a coordinator who does an intake assessment on each client or family to determine how to assist with needs and connect to services, such as medical and housing assistance. Other agencies – like UPMC Pinnacle, Crisis Intervention, and Dauphin County Case Management Unit – have begun to provide services at the Drop-in-Center on a regular basis to meet with clients.

Help provide year-round access to much needed urgent services to our friends & families who are homeless, or dangerously close to becoming homeless. There are many ways you can get involved! Please visit www.downtowndailybread.org to learn more and please contact Anne Guenin at 717.238.9304 x108 or aguuenin@pinestreet.org, or Chris Patrick at 238-4717 x128 to see how you can make a difference!

Together we can help those in need and make homelessness rare, brief and non-recurring.

EMERGING PHILANTHROPIST PROGRAM (EPP)

The Emerging Philanthropist Program (EPP), a partnership between The Foundation for Enhancing Communities (TFEC) and Harrisburg Young Professionals (HYP) awarded Downtown Daily Bread a \$5,000 grant for their *Workshops for Living* program.

Downtown Daily Bread serves the hungry and homeless of Harrisburg, providing a daily lunch and other services, including lockers, bus passes, transportation, photo identification resources, haircuts, laundry tokens, mail delivery, and food vouchers.

Workshops for Living provides meaningful life skills lessons to transitioning homeless and at-risk populations.

[Click here for more information.](#)



**Capital Area Coalition
on Homelessness**



CLICK HERE TO LEARN HOW TO APPLY FOR A GRANT>>

COMMUNITY

FEATURED GRANTEE ORGANIZATION

Please Live cultivates mental wellness through education and awareness of mental health challenges, focusing primarily on depression, anxiety, and suicide prevention. In 2016, Please Live received a \$1,372 grant for STOMP - Student/Teen Outreach for Mental (Illness) Prevention.

[Click here to read more and learn about all of TFEC's grant opportunities.](#)



UPCOMING GRANT DEADLINES

February 1, 2018

- Camp Hill Area Community Foundation
- The Children's Home Foundation Fund
- Family and Children's Services of Lebanon Cty Fund
- Perry County Community Foundation
- The Kids Trust Fund

[Applications now available! Click here for more information or to apply.](#)



AGENCY FUND CORNER

WAYS TO GIVE

As the end of the year approaches, now is a good time to remind donors that your nonprofit organization has an endowment fund. Your endowment fund shows donors that your organization is here to stay and is committed to continuing the good work you are doing today, into the future.

Don't forget to let your donors know there are many ways they can contribute and be part of your legacy. TFEC can accept direct gifts of assets for your endowment fund, including marketable securities, closely held business stock, mutual funds, real estate, tangible personal property, life insurance policies, qualified retirement plan assets, cash, and more!

Donors love choice. Having the flexibility to accept so many different types of gifts will appeal to them. Donors also love to see your nonprofit work hard and plan for your future, and would be honored to be part of that legacy. An endowment fund demonstrates your nonprofit's commitment to success and future longevity - TFEC is here to join you on this journey.

ENDOWMENT-BUILDING SERVICES FOR AGENCY FUNDS

When your nonprofit organization chose to establish its' endowment fund with TFEC, you were likely aware of some of the benefits like TFEC's credibility, the elimination of auditing costs and taxes on your fund, and legal assistance through our lawyer, Spencer G. Nauman, Jr., often at no cost to your agency or your donors. But have you been taking advantage of all TFEC can do for you? We can offer additional assistance by accompanying you on calls to endowment fund donors and prospective donors, provide marketing assistance through the editing of endowment articles for your newsletter, brochure, or website, and TFEC can even accept complex gifts you may not have had the capacity to accept before.

We want to help you achieve your mission by ensuring the success of your endowment. Having a healthy endowment shows donors you are here to stay.

Let TFEC assist you in growing your endowment – give us a call to talk about how we can work together today.

Allison Brubaker | 717.236.5040
Asset Development & Scholarship Officer



[CLICK HERE TO LEARN HOW TO APPLY FOR A GRANT>>](#)

TFEC'S EARLY EDUCATION INITIATIVE

COMMITTEE MEMBERS

David Volkman, Chair
Department of Education

Kathleen Bentley
Perry County Literacy Council

Eric Bostick
Capital Area Intermediate Unit

Patricia Bruner
Early Education Center of Perry County

Denise Feeser
Waynesboro Day Care Center

Amber Fields
United Way of the Capital Region

Karen Grimm-Thomas
Office of Child Development and Early Learning

Brenda Hanthorn
Lancaster-Lebanon Intermediate Unit 13

Hannah Killian
Dauphin County Library

Andrea Lown
HACC Lancaster Campus

Judy Maietta
CCIS of Cumberland, Dauphin, & Perry

Norma Miranda-LaBoy
Hamilton Health Center

Stacy Ott
Shippensburg Head Start

Kathleen Pavelko
WITF

Jo Pepper
Capital Area Head Start

Amy Reed
Cumberland/Perry MH/IDD Program

Christy Renjilian
Child Care Consultants, Inc.

Annette Searfoss
Franklin County Head Start, Inc.

Tamara Willis
Susquehanna Township School District

Lucy Zander
United Way of Carlisle and Cumberland County



TFEC FORMS EARLY EDUCATION ADVISORY COMMITTEE

TFEC has been investing specifically in early education for over 11 years beginning as Capital Beginnings in 2006 when we received the Community Engagement Outreach contract for Dauphin County. Over time, this funding has disappeared, but TFEC has remained committed to the cause and continued to secure grants and contributions to maintain the work.

In 2014, TFEC was one of 12 community collaboratives across the commonwealth to be awarded with a Community Innovative Zone grant from Pennsylvania's Office of Child Development and Early Learning (OCDEL). This funding was part of the \$52 million Pennsylvania was awarded by the U.S. Department of Education's "Race to the Top-Early Learning Challenge". TFEC, on behalf of our community collaborative, received Race to the Top funding equaling \$225,000 over three years; and secured nearly \$235,000 in matching funds from local organizations and individual donors to continue our good work.

WE REMAIN COMMITTED TO CONTINUING THIS WORK AS TFEC'S EARLY EDUCATION INITIATIVE.

With the implementation of the TFEC 2017-2020 strategic plan, TFEC's Board of Directors has solidified our continued commitment to early education; to take what we have learned and work collaboratively with others within our region. Our goal remains the same as it always has: wrap support around the whole family in an effort to close the achievement gap by third grade by focusing on kindergarten readiness skills.

Our first step to creating community change was to create an Early Education Advisory Committee with representation from each county in TFEC's footprint. The inaugural meeting was held October 12, 2017. To be effective and relevant, the committee includes representatives from business and industry, community leaders, school representatives, and early learning providers. The committee will explore the systems, partnerships, and leadership roles that best enhance and strengthen connections focusing on service to children from prenatal to five years of age, which is critical due to the lack of cohesiveness in the early education sector.

KINDERGARTEN TRANSITION CONFERENCE HELD

On October 26, 2017, TFEC hosted a Kindergarten Transition Conference for early learning providers, kindergarten teachers, and school district administrators serving Dauphin, Cumberland and Lebanon Counties. This conference was a collaborative effort between three Early Childhood Community Innovative Zone grantees, the United Way of Carlisle & Cumberland County and the South Middleton School District, the Lancaster-Lebanon IU13, and TFEC. The theme for the conference was "STEAM" in the early education classrooms; science and technology interpreted through engineering and the arts, all based in mathematical elements.

TFEC has been offering transition forums and conferences in Dauphin County since 2012. In 2018, TFEC plans to expand this conference to our entire service area of Cumberland, Dauphin, Franklin, Perry, and Lebanon Counties.





WOULD YOU LIKE TO BE FEATURED IN THE NEXT EDITION OF THE INSIDER?

Send us your photos of what community means to you and you may be featured in our next issue!