creating a VIBRANT YORK COUNTY

Revitalizing Downtowns

Embracing Aging

Advancing Education

2013 | ANNUAL REPORT

York County Community Foundation
What a year it has been! So many of you have helped us start the ball rolling toward creating a vibrant York County, and we are forever grateful. We can’t do it without you!

Let’s get right to it: How are we creating a vibrant York County? In 2013, we…

- Engaged donors by adding more than 30 new funds and $14.4 million in total gifts.

- Provided community leadership through: collaborating with Moving Plans into Action to implement downtown revitalization projects; advocating for education by supporting the Communities in Schools model, which provides resources within the schools for children and their families; and convening our committees for grantmaking toward common community improvement goals.

- Invested in our high-impact initiatives: we helped revitalize downtowns throughout York County, including projects in Dillsburg, New Freedom, and Hanover; we hired Cathy Bollinger as Managing Director of Embracing Aging to help...
the Embracing Aging initiative get the ball rolling; and we supported education reform through our grantmaking and convening of funding partners to provide innovative programs.

- Built endowment by having a second year of great investment return at 16.4% (compared to a 13.6% investment benchmark) AND reached $100 million in total assets. Our continued asset growth emphasizes the community confidence in our mission, leadership strategy and financial stewardship practices.

- Increased the Fund for York County through the creation of 8 new funds. In 2014, the Community Foundation hopes to leverage the Fund for York County by partnering with other community funders to implement the Communities in Schools model in York City.

- Awarded grants totaling $2.7 million to organizations throughout York County, ranging from education, revitalizing downtowns, and embracing aging to agriculture and land preservation and strategic alliances.

- Doubled our YorIt membership and enjoyed the success of YorIt's Social Venture Grant Recipients, who have brought innovative ideas and projects to our community.

- The Women's Giving Circle, which passed its first decade milestone, has cumulatively awarded more than $500,000 in grants since its inception.

- Honored Louis and Jody Appell at our 2013 Donor Appreciation Event. They are the ultimate supporters of revitalizing York's downtown. In his speech to a crowd of more than 300, Louis challenged all York Countians to help reinvigorate our downtown. You can find his speech at yccf.org/news.

- Presented the Aging Report at the OLLI Luncheon, which was attended by Brian Duke, Pennsylvania’s Secretary of Aging. Jane Conover, Senior Vice President, presented the Embracing Aging Study: Making York County a Livable Community for ALL Ages.

- Invested in the strategic professional development of the Community Foundation management and staff. Our strategic direction called for a streamlining of our internal communications process as well as team-building for each employee and ongoing individual development for management.

This quick look back reminds us of our obligation to you: We are leading the charge to create a vibrant York County by collaborating with community leaders, convening necessary stakeholders, and advocating for change. Engaging with you, our donors, makes this all possible. We have started the ball rolling toward a vibrant York County and are looking forward to 2014 with much excitement. With your help, the positive momentum will continue!
NEW 2013 NAMED FUNDS FOR YORK COUNTY AND GREATER HANOVER

Josephine and Louis J. Appell Jr.
Fund for York County

Louis and Jody Appell share a love of York and its downtown that is unmatched. They can be found strolling downtown on First Fridays, cheering on the York Revolution during baseball season, attending the Strand and the Symphony regularly, and always with their basket at Central Market on market days. When they see a need, they do more than talk about it. They initiate change. Louis and Jody know when to call people to rally the troops and make positive change occur.

"Louis and Jody Appell have always had an unwavering and steadfast vision of an ever-improving quality of life for our community, especially when it comes to the City of York, the center of our community," said their friend Tony Campisi. "Their vision and leadership has had an immeasurably positive impact on our community, both in the present and for future generations to come."

At the Community Foundation’s 2013 Donor Event honoring the Appells, Louis praised the efforts of the Community Foundation and specifically its initiative to revitalize downtown York. "The future of the City and its central core looks brighter than at any time since our leading retailers either closed up shop or moved to the suburbs. The recognition of the City’s importance to our entire region is taking hold and producing results," said Louis. He and Jody created their Fund for York County, the Foundation’s most flexible fund, several years ago to help the Community Foundation take a leading role in addressing these issues.

The great leadership offered by the Appells has been inspirational to the community, and especially to the Community Foundation. With their help, we are getting the ball rolling on revitalizing York’s downtown through collaboration and philanthropy. As native Yorkers, Jody and Louis describe their commitment as having fun as they fulfill their responsibility to the community.

by engaging

DONORS

The Community Foundation makes giving easy and flexible while providing services tailored to your charitable and financial interests.

YORK COUNTY COMMUNITY FOUNDATION
2013 Annual Report
Funds started by generous donors who know they can’t predict future needs, but understand that starting a fund with no restrictions on grantmaking allows the Community Foundation to tackle causes and issues that are not yet imagined.

**A**
- A. Anstine Family Fund for York County
- Josephine and Louis J. Appell Jr. Fund for York County

**B**
- Edith Allen Barber Fund
- Marie G. Baumeister Fund
- Former Judge Albert G. Blakey III Memorial Fund for York County
- Alice Marie and Michael Boustead Fund for York County
- Ralph and Charlotte Brooks Fund
- Lester L. Buchart Fund

**C**
- Chairmen Emeriti Fund for York County

**D**
- Linda and Dave Davidson Fund for York County
- Louise S. Deane Fund
- Philip B. Deane Fund

**E**
- Marsha Everton & Jack Stover Fund for York County

**F**
- Ben Franklin Trust Fund
- Charles and Adaline Frysinger Fund
- The Fund for York County
- Rodger K. Furse Fund

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**Bill and Reenie Hartman Fund for York County**

Bill and Reenie Hartman love life in York. After many years in the Midwest, the couple is happy to be back in York County where Bill was born and worked in banking. Now that their children are grown, Bill and Reenie take full advantage of everything York has to offer: restaurants, the Strand-Capitol, the symphony, ball games, and Central Market fall onto their list of favorite things to do. Bill, current president of the Community Foundation, was of two minds when he and Reenie created the Bill and Reenie Hartman Fund for York County. First, he knew that as the head of the Community Foundation, he needed to lead by example. Second, he believes wholeheartedly in supporting the local community and giving back where he lives. “What better way to invest in your future and the future of your community than to create a named Fund for York County,” Bill said. “The focused strategic direction of the Community Foundation, along with the careful and prudent stewardship of its endowment portfolio, provides a secure vehicle for Reenie and me to feel comfortable with our investment. And we know that our charitable wishes will be carried out in perpetuity.”

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**Marsha Everton & Jack Stover Fund for York County**

Marsha Everton and Jack Stover each learned the life lesson that sharing resources with others is a responsibility. That’s why they created the Marsha Everton and Jack Stover Fund for York County. “We are committed to improving our community through personal involvement and shared financial resources,” explained Marsha.

Marsha, who serves on the Community Foundation’s board, and chairs the marketing and communications committee, grew up in a military family that moved frequently. Jack was born and raised in Carlisle, in a family whose history reaches back to Governor Joseph Ritner. They settled in Dover and raised their three children with the same values taught by their own parents.

The couple chose the Fund for York County because they support the strategic approach of the Fund, which focuses on a select number of high-impact initiatives. “We believe that the most powerful, meaningful way to build a better future is to collaborate for collective impact,” said Jack. In addition, they trust in the Community Foundation’s stewardship of their legacy.
Kerlin Family Fund for York County

When the Community Foundation came forth with a request to consider committing to endow a Fund for York County, Bill, a former Board Chairman of the Community Foundation and his wife, Kim, decided to support this initiative immediately. “Under the leadership of Bill Hartman, the Board and staff of the Foundation, it was clear to us that the Foundation had become a real leader on-point with key community initiatives of importance,” Kerlin said.

“Endowment is critical to ensuring ongoing support to such programs for our community and we hoped by stepping up to the plate immediately, we would also encourage others to consider doing the same. In short, the Community Foundation earned it by the leadership and proactive role it plays.”

While the Kerlins have a separate donor advised fund that allows them to support local organizations of their choice, creating this unrestricted endowment was an easy choice for them that enables the Foundation to build upon its record of driving community improvement. “Knowing the exceptional job of stewardship and investment management being done by the Foundation, we have faith that our endowed fund is in good hands and will grow in value and ultimate support to the needs of our community,” said Bill.

Loren and Faye Kroh Fund for York County

Loren and Faye Kroh have always been active philanthropically, but they admit, not in a particularly organized way. About 10 years ago, they created a small donor advised fund at the Community Foundation to focus their giving and get other family members involved.

Since then, Loren and Faye's thinking has evolved and this year they created a named fund within the larger Fund for York County. “We like the fact that our money will be used to fund larger, more impactful initiatives overseen by present and future generations of community leaders on the Foundation board,” Loren said.

Michael and Eloise Newsome Fund for York County

Michael and Eloise Newsome never intended to stay in York County very long. Originally York was going to be a short career stop, but a peculiar thing happened along the way – they started giving to the community and the community responded. The Newsomes believed that York County was relying on them to make a difference.

“York County grows on you, especially if you immerse yourself into its cultural, business, and social life,” said Michael. “When you appreciate the needs of the community, you give of your time and talent to make York a better place to live, work, and play.” The next logical step for the Newsomes was to make a difference through charitable giving. The Community Foundation’s Fund for York County was the right vehicle for Michael and Eloise to continue their community work and develop the legacy they hope to leave in York.

“The Michael and Eloise Newsome Fund for York County will help us make York a great place to live for everyone,” said the Newsomes. “We’re pleased to be able to make a difference.”
Paul and Lori Rudy Family Fund for York County

Paul and Lori have lived and worked in York County since 1994. They both believe that it is everyone’s responsibility to give back to the community where you work and live. York County Community Foundation, and more specifically the Fund for York County, are the perfect conduits to see that their charitable dollars are used for the most critical needs for the betterment of York County. They want to be part of creating a vibrant York County for their family and generations to come.

Ralph Serpe and Bryan Tate Fund for York County

Bryan and Ralph met in 2008 through their work at their respective community foundations. Bryan is a native Yorker, who has long been involved in public service and community leadership, and has served at York County Community Foundation for 10 years. Ralph is a native of North Babylon, New York, and has devoted nearly two decades to leading community foundations in Silicon Valley, Princeton, and Baltimore. Both are recognized leaders in the field of raising charitable assets to endow local communities in perpetuity. They’re doing it in York and Baltimore, and they’re encouraging other community foundations around the country to do the same.

Living in downtown York, Bryan and Ralph actively participate in community events at The Yorktowne Hotel, the Strand-Capitol, and The Valencia Ballroom. They are proud to support their downtown neighborhood cornerstones, Downtown Inc, Martin Library, York County Heritage Trust, and the YWCA. They support downtown’s restaurants and Central Market weekly. And they cheer on the York Revolution every season.

And now, with the Ralph Serpe and Bryan Tate Fund for York County, they are able to support the greatest needs of the York community … forever.
Rick and Carol Smith Community Endowment Fund

Rick and Carol Smith have known since their children were very young that they wanted to give back to the community. When they discussed their charitable intentions and what they wanted to accomplish, their friend and advisor Bill Anstine recommended the Community Foundation. That recommendation stayed with the Smiths for many years and when the time was right they looked to their financial advisor, Holly Mayer, to pull all the pieces together. Rick and Carol became 1749 Legacy Society members in 2011 and were able in 2013 to use the IRA charitable rollover to start their fund. Their fund gives both to the Fund for York County and Carol’s lifetime passion, the Martin Library. Rick and Carol believe in the importance of giving back and they feel they are lucky to be in the position they are today. “It’s not so much about what you make in life but what you give back,” says Rick. Carol adds, “Being able to ensure the future of the library for others to enjoy is a reward in itself.”

Carson Family Fund for Greater Hanover

Betty and Richard Carson know what it means to give. They volunteer their time and resources for many nonprofits and care deeply about the welfare of their community in Hanover. They created the Carson Family Fund for Greater Hanover as another means to support the community where they raised their children and enjoy living.

Betty, a current board director at the Community Foundation, and Richard, president of Webb Insurance, take the time to enjoy outdoor activities, particularly bike riding, as well as dining out. They also share an interest in supporting the arts and education. They will decide each year which nonprofits to support, with a particular focus on the Hanover area.

“Our reasons for giving are fairly simple,” Betty said. “Richard and I firmly believe in giving back to our community, and we’re proud that, with the help of like-minded people, the Hanover community will be a good place to live for future generations.”
1749 SOCIETY
Named for the year in which York County was founded, the 1749 Society was created to recognize those individuals whose estate planning includes a gift to York County Community Foundation.

1749 MEMBER:
Robert A. Bowen

Robert A. Bowen is an active community member who has been involved with many local organizations, including as a member of the Community Foundation’s Investment Committee for more than a decade. So it came as no surprise when Rob joined the Community Foundation’s 1749 Society, a group that recognizes individuals for including the Foundation in their estate plans. “As a financial advisor, I think it is important for me to do as I preach. I feel philanthropy should be a part of everyone’s financial plan,” Rob stated.

Rob’s York County Community Foundation philanthropic interests focus on the New Birth of Freedom Council, Boy Scouts of America (he was an Eagle Scout and former Board Member/Treasurer); Lutheran Social Services of South Central Pennsylvania, where he currently serves as Chairman of the Board; and Martin Library, where he currently serves as Board Member and Treasurer. The Robert A. Bowen Family Fund, which will be created upon his death, is a way to recognize the importance of family to him and continue demonstrating his personal commitment to philanthropy.

While many people join the 1749 Society by designating the Community Foundation as the beneficiary of an existing insurance policy for their philanthropic legacy, Rob bought a new permanent policy specifically for that purpose. To him, it made financial sense. “For pennies on the dollar, I can create my legacy for my favorite charities and know that it will be wisely stewarded by the Community Foundation, forever,” Rob said.

“Joining the 1749 Society is a further step of my charitable giving,” Rob admitted. “I intend to use every creative method at my disposal to support other charities. Because the Community Foundation can accept any type of asset and has so many creative vehicles by which to create a legacy, it is an ideal location for my charitable giving.”

New 1749 Society Members
Robert A. Bowen
Maria Musti Cook
Milton H. & SaraAnn Lehman* Gingrich
Marvin Merrick
Charles and Carolyn Schaefer
William H. Simpson*
Meg and Bill* Swartz

*We remember

10 NEW MEMBERS
273 1749 SOCIETY MEMBERS
$7,751,032 LEGACY GIFTS RECEIVED IN 2013

FOR FULL 1749 SOCIETY MEMBERSHIP LIST | YCCF.ORG
Richard Lee Beck Fund

Richard “Dick” Lee Beck felt very strongly about charitable giving and understood the importance of creating his legacy. This fund was created through a bequest from his estate that equally supports 10 charitable organizations. Dick first came into contact with the Community Foundation in 1998 and discussed with his attorney, John Stitt Esq., the idea of creating his legacy to perpetuate his charitable giving forever. Mr. Stitt worked directly with Eugene C. Struckhoff (former Executive Director of Development for York County Community Foundation and an expert in the field), who suggested language that helped Mr. Stitt provide Mr. Beck with an estate plan that truly met his needs.

Mr. Beck was an engineering professional at the Borg Warner facility in York, PA who believed strongly in supporting education, his church, as well as many other national organizations that help York Countians, especially in the matters of health.

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After the war, Arthur finished up the engineering degree that had been interrupted by military service. They were married in June of 1948, and set about raising a family. Kindness and generosity of spirit characterized Margery and Arthur Freas’ partnership. Having grown up during the depression of the 1930’s, and the privations of the war effort, they had both experienced the challenges of living with less than they wanted, or needed—they knew what that felt like. When they could help, they did; they were always watching for the opportunity.

Don Freas writes: As news of their deaths has spread we (children) have received notes from individuals all over the country telling stories of assistance delivered both as letters of encouragement, and help with expenses or expertise. Even a smile, or a few humorous words often stayed in the hearts of the many people they touched. Each of these stories contains a line or two about what a difference their kindness made during a challenging time.

Many of these stories have come as a surprise to us, their children. We knew about many of their larger philanthropic efforts: health, education, the arts—but the smaller personal contacts were often not mentioned; there were just too many.
Lifelong Learning Endowment Fund

Established by an anonymous donor, this fund supports the Osher Lifelong Learning Institute at Penn State York. The Fund is intended to honor OLLI founders Charmaine Kissinger, Olive Padden, and the late Gussie Petron, three women who were bored and ready to make more of their retirement. They met by chance at the Jacobus Library and called themselves a “cog in the wheel of learning.” They began talking about what could be done to provide adult learners with educational opportunities and more. Their mantra of “curiosity never retires” and their thirst for knowledge and mental stimulation, led them to create OLLI. The member group has grown from a handful of people to more than 500. The idea of offering courses of interest during the day for adult learners without the stress of tests, requirements, and official textbooks appealed to them. OLLI at Penn State York is one of more than 100 lifelong learning institutes across the nation.

Doris E. Schwartz Education Fund

Doris Schwartz, a long-time resident of West York, was nearly a century old when she died in 2013. During her lifetime, she took full advantage of all life had to offer. She was an educator and a flight attendant who travelled extensively around the world, and her vast and varied experiences gave her an appreciation of the importance of education at every stage of life.

The Doris E. Schwartz Education Fund was created in 2013 from Doris’s estate under the direction of her friends and executors Nancy L. Frey and Kenneth R. Smith, with help from Doris’s attorney John Stitt. Doris’s passion for education and lifelong learning will now help teachers and students in York County. Public school teachers will be able to apply for a fellowship that will meaningfully increase their capacity as a leader. The student scholarship will benefit every school district in York County and will be awarded to students who meet certain qualifications and demonstrate character, academic achievement, and financial need.
George and Josephine Schmidt Fund for Martin Library

Jody Appell learned about giving at a young age. When she was 10, her mother would take her around the neighborhoods to collect money in Visiting Nurse Association (VNA) bags. “We would knock on every door on every street, and everyone gave. The experience taught me so much about people’s generosity. It was so very rewarding,” says Jody. Her parents believed that giving back of your time was just expected. It was that dedication to the community that Jody found so inspirational and cemented her love of volunteering. As a young woman, Jody’s favorite volunteer experience was at the Princess Street Babies Clinic. There she measured the height and weight of the babies, and the volunteers voted on the healthiest baby for the coveted “Baby of the Year” award. Jody also loved her volunteer time at Martin Library, which she saw, and still sees, as a very special gathering place for the community. Jody spent countless hours there filing cards back into the card catalogue.

Jody became involved with the Community Foundation in 1975 when she joined the Board, eventually serving as board chair in 1980-1981. Today she is incredibly excited about the direction the Community Foundation has taken in recent years and about the positive changes that are happening in this community for which she cares so deeply.

Fred A. and Naomi K. Werner Fund

Fred and Naomi Werner established a Donor Advised Fund in 2008 to provide for the charities that they cherished in York County. Fred and Naomi cared deeply about their adopted community. They moved here in 1979 after they had both retired and made York County their home for more than 30 years. After Naomi’s death, Fred established a second fund in their names that would designate grants to their favorite charities in perpetuity. The designated fund will provide annual distributions to the Salvation Army, Lehman Center and the Children’s Home of York.

Josh Cervenak Future Fund

Josh Cervenak died December 30, 2011, from a rare type of lymphoma at the age of 38. Josh was a graduate of Central York High School and Washington and Jefferson College with an advanced degree from Villanova University.

With his positive and outgoing nature and wonderful sense of humor, Josh participated in leadership and service positions in York’s business and social organizations. He actively supported programs that benefitted the children and youth of our community.

In addition to his strong commitment to Junior Achievement, Josh supported Hugh O’Brian Youth Leadership (HOBY), Make-A-Wish Foundation, and Special Olympics. He also served as a member of the Board of Directors for the Children’s Home of York.

His parents, Sharon and Joe Cervenak, created the Josh Cervenak Future Fund “to honor his life and to establish his legacy.” The Josh Cervenak Future Fund is thus dedicated to the future of the children and youth of York County celebrating Josh’s commitment to them.
Steigelman and Zerbe Family Fund

The Steigelman and Zerbe Family Fund was established by Susan and Richard Zerbe. "My parents were very quiet, inward reflecting people who left a large part of their estate to charity. Honoring them with this named fund seemed the right thing to do," said Susan Zerbe. The Zerbes, who have travelled extensively around the globe, observed how many in this world struggle on a daily basis for their basic needs. They understand how fortunate they are and wanted to use some of their resources to help make a difference in other people's lives. "We were impressed by the diversity of programming options the Community Foundation offers. It allows us to tailor our fund to support the programs we feel most passionate about," says Susan. The Zerbes feel it is also a way to continue to make a difference after they're gone. They appreciate that monies left in their fund after their death will be used to fund future York County needs that may not currently exist. Richard writes, "It is also a way for our children and grandchildren to have an understanding of our values and what is and was important to us."

Debra Stock Fund for YWCA York

A group of friends and family of Debra Stock created this fund upon her retirement as CEO of YWCA York to honor her years of dedication as both board director and CEO of the YWCA. Friends believe that Deb Stock's incredible passion for the causes she cares about as well as her drive are an inspiration to all who know her. "Deb has done so many things that are outstanding that many people aren't even aware of. Having a fund in her name will make her permanently remembered for all of those contributions," says Sue Schmidt.
Jason Vest Memorial Scholarship Fund

Jason Vest was a 2001 Kennard-Dale graduate and a varsity cross country and track participant. He had an unquenchable thirst for knowledge that made him an unwavering advocate for education. Jason’s life was cut tragically short after a yearlong battle with sarcoma. As a testament to Jason’s passion for learning, generosity and volunteerism, this fund was established by his wife, Laura, to provide scholarships to Kennard-Dale students planning to further their education in the areas of science, technology, engineering or mathematics.

Mike Heidler Family Fund

Heidler Roofing has been giving back to York County for a long time, and that’s the way Mike Heidler likes it. For the past 55 years, Mike says that York County has supported his business, so giving back is only natural. “It makes us, the ownership, happy to give back to the community and to the people that really need the help,” Mike said. Now he believes it’s time to take his charitable giving to a more personal level. Mike established the Mike Heidler Family Fund at the Community Foundation so that he could keep giving back to the community in ways that have personal meaning to him. Mike knows he is one of the fortunate ones: he balances a successful business with quality family time, and is able to do things he enjoys such as play golf and dine out. This fund will remind his family of the importance of sharing with others who are less fortunate and will allow them to be more involved in philanthropy.

Katherman, Briggs and Greenberg Community Fund

When attorneys from Katherman, Briggs and Greenberg (KBG) met with the Community Foundation, they realized that creating a fund through the Foundation would be the start of a great partnership. The partners of the firm were impressed with the number and variety of funds, and the confidence that so many have placed in the investment abilities of the Community Foundation. They determined that an endowed fund would be a visible and manageable way for KBG to encourage and organize their company’s community philanthropy as well as allow them the ability to make end-of-year gifts to the fund and decide later how to grant in a more strategic way. “KBG is proud to have established a permanent donor advised fund through which we will direct all of our charitable and community activities. We are thrilled to be part of the Foundation and to take part in creating a vibrant Central Pennsylvania for present and future generations,” said Brian Strong, a partner at the firm. “KBG recently celebrated its 30th anniversary and has a long-standing tradition of giving back to the community. The Community Foundation and its mission are completely compatible with the firm’s practice of helping people in need, and the new fund will allow this tradition to continue forever,” Brian added.
William H. and Judith A. Simpson Family Fund

The William H. and Judith A. Simpson Family Fund was created with a bequest from the estate of Bill Simpson, who passed away in 2012. Judy Simpson is proud to have her husband’s legacy continue through the Community Foundation. “Bill had a tremendous impact on York County Community Foundation and its role in the community,” she said. “He was a member of the board in the Foundation’s early years and had a firm commitment to promoting philanthropy in our community.” Bill was a strong supporter of the York Academy Regional Charter School, where the new playground is dedicated in his honor; and had the vision for Steam Into History. It was Bill’s energy and enthusiasm that brought Steam Into History’s replica steam locomotive, “The William H. Simpson #17,” to life.

Judy is also active in giving back. She served as a Community Foundation board director, founded the Community Foundation’s Women’s Giving Circle along with Carolyn Steinhauser, and also served as its chair. In addition, Judy is founder and current chair of the York County Honors Choir and is involved in numerous other community efforts.

Judy is pleased to be able to continue the Simpson legacy. “Bill will be remembered for his talent, compassion, and dedication to his community, friends, and family,” said Judy. “This fund will allow me to continue to support his interests as well as develop new ways to help meet the needs of our community.”

Jeff and Cindy Lobach Community Fund

Jeff and Cindy Lobach’s varied and eclectic volunteer service led them to create the Jeff and Cindy Lobach Community Fund at the Community Foundation. Jeff, a former Community Foundation board director and current Legal Counsel, said, “I had a front row seat at the transformation of the Community Foundation to its present proactive and impactful state. With college in the rearview mirror for our three sons, we thought now would be a good time for us to focus our giving more strategically and the Community Foundation is the perfect vehicle.” The Lobachs are passionate about youth, education, health care, and their church, and support organizations that can have “transformative or life-saving effects on our neighbors,” according to Cindy. Globally, the Lobachs are currently working to preserve an area of the Amazon rainforest by helping the villagers living on the edges of the gigantic Tahuayo Tamshiyacu reserve. Jeff and Cindy introduced their boys to volunteering and philanthropy by including them in their efforts, which have ranged from marching in support of the Chinese refugees from the Golden Venture in the mid-90s, to bringing them along to the soup kitchen. “One dividend of starting a family fund will be to involve them in philanthropy since they will be making decisions for the fund eventually,” said Jeff.
Brian Strong and Andrea Marceca
Strong Family Community Fund
Andrea and Brian moved to York after graduating from law school with few resources but a strong belief in giving back to the community. Brian says that he and Andrea have always been involved in volunteerism. Their current efforts include pro bono work as well as coaching their kids’ sport teams and serving on a variety of boards and organizations.

Now Brian and Andrea feel the need to do more. “We are fortunate to reach a point in our careers where we can give back to the community in a more focused manner, and the Community Foundation is a perfect vehicle through which to accomplish this,” said Brian. Andrea and Brian appreciate the more tangible results that come from giving locally, whether it’s giving of their time or other resources, and they have passed lessons on giving to their children. “This fund will be another way for us to involve our children in the process and to teach them the importance of philanthropy,” said Brian.

Sue and Elliott Weinstein
Family Fund
Sue Weinstein is a Yorker and proud of it. She met her husband, Elliott, while they were at Penn State, and when she took her first teaching job in York, Elliott followed. “The rest,” she says, “is history. We’ve been here ever since, and it was the best decision Elliott ever made!”

Both Sue and Elliott are happy to be in a community like York because of the meaningful connections they have created. They raised their three children in York but have always counted philanthropy as a fourth child. They created their fund at the Community Foundation as a strategic financial charitable plan to support their community forever.

“It’s all about community,” Elliott says. “Our three kids will understand when we divide our estate into fourths rather than thirds, because if you don’t help create community, you have no stake in it.” Elliott emphasized the importance of endowed charitable giving, which allows the Weinsteins to maintain a level of giving despite economic factors that may affect their business. “The time was right to take advantage of the Community Foundation’s endowment building and be assured this fund will help our community forever.”

York Revolution Community Fund
The York Revolution has created a charitable endowment at York County Community Foundation that will help the organization meet its philanthropic goals over the long-term. The Revolution will select community nonprofit organizations each year to receive grants from the York Revolution Community Fund. The Fund is a vehicle for the Revolution to give back to the community in a thoughtful, strategic fashion that will last in perpetuity. Eric Menzer, president and general manager of the York Revolution, stressed that even though the Revolution is a young business, the organization plans to be in York forever. The establishment of this Fund is a symbol of its permanence and the mark it hopes to make in the community.

Discover your passions, support your community, encourage others.
**N**
- National Leasing Company Fund
- Charles E. and Anna M. Naylor Fund
- Andrea Miller Neiderer Memorial Scholarship Fund
- Raymond L. Ness Fund for York County
- Robert and Lynn Newcomer Family Fund
- Michael and Eloise Newsome Fund for York County
- Norris Family Community Fund

**O**
- Otterbein Early Childhood Care and Education Fund

**P**
- Anna, Bennett and John Pearson Scholarship Fund
- Bob Potts Memorial Fund
- Pearl K. Prowell Trust Fund

**R**
- Renner Medical and Mental Health Scholarship Fund
- W. Scott and Brenda Rhinehart Family Fund
- Kevin Rice Memorial Fund
- Flo A. Rider Children’s Fund
- G. Stuart and Margaret A. Rohler Fund
- Rosenmiller Family Fund
- Rotary Scholarship Fund

**S**
- St. Paul's Lutheran Church Early Childhood Care and Education Fund
- Dr. and Mrs. John K. Sanstead Fund
- Charles and Louise Sawmiller Fund
- G. Edward Saxe Family Foundation Fund
- Mr. and Mrs. David P. Schwartz Fund
- George and Josephine Schmidt Fund for Martin Library
- George and Josephine Schmidt Fund for York County
- George and Josephine Schmidt Memorial Fund
- Sue C. and John C. Schmidt Fund
- Doris E. Schwartz Education Fund
- Jeanne Schwartz Memorial Fund
- Dominique Nichole Scott Memorial Fund
- Ralph Serpe and Bryan Tate Fund for York County
- Shearer Industrial Supply Company Fund
- Gracey M. & Paul R. Shelly Fund
- Phil and Kay Sheridan Fund
- Shipley Scholarship Fund
- Richard S. Shue Fund for Spring Garden Band
- William H. Simpson Fund for Community Advancement
- William H. and Judith A. Simpson Family Fund
- Beauchamp E. and Josephine D. Smith Fund
- John T. and Paige S. Smith Fund
- Rick and Carol Smith Community Endowment Fund
- Charles E. & Berdella Emig Snyder Memorial Fund
- Southern York County Rotary Scholarship Fund
- Enoch M. Spingle Fund
- Stathieber Family Fund
- George L. Stallman, Jr. Fund
- Joan and David Stauffer Jr. Fund
- S. Walter Stauffer Fund
- Esta Sholl Steich Christian Mission Fund
- Steigelman and Zerbe Family Fund
- Carolyn E. Steinhauer Fund
- Carolyn E. Steinhauer Fund for Nonprofit Excellence
- Carolyn Eyster Steinhauer Fund for York County
- The Nevin and Jeanette Stetler Fund
- Randy Stetler Memorial Scholarship Fund
- Debra Stock Fund for YWCA York
- Florence B. and Clyde W. Stouch Foundation Fund
- Brian Strong and Andrea Marceca Strong Family Community Fund
- Eugene C. Struckhoff Fund
- Donald A. and Gretchen Wolf Swartz Fund for York County
- Gretchen Wolf Swartz and Donald Swartz Fund
- Meg and Bill Swartz Family Fund
- John R. Taylor Fund
- Chester H. Thomas Foundation Fund
- Brock Terney Memorial Scholarship Fund
- C. Wm. Trout Fund

**T**
- United 4 York Fund

**V**
- Venture Fund for Penn State York
- Harriet R. Venus Fund for York County
- Mary Ellen Venus Fund for York County
- Jason Vest Memorial Scholarship Fund
- Viet Nam Veterans Memorial Endowment Fund
- Vizzi Family Fund

**W**
- Wagman Corporate Community Fund
- Edward and Sally Wagman Family Fund
- Richard and Carol Wagman Family Fund
- Wand Family Fund
- Arie Knipel, Harry V. and J. William Warehime Foundation Fund
- Warehime Fund for Greater Hanover
- Alethea and Graham Watts Memorial Fund
- Sue and Elliott Weinstein Family Fund
- Fred A. and Naomi K. Wernher Fund
- Fred A. and Naomi K. Wernher Fund (2)
- Charlotte R. and Ralph Westerman Family Fund
- Albert S. Weyer Community Health Fund
- Whelan Family Fund
- White Rose Foundation Fund
- Morgan and Mary Elizabeth Whiteley Fund
- Roland M. and Lillian R. Whitemire Fund
- Roland M. and Lillian R. Whitemire Fund for York County
- Raymond L. Wible Jr. Endowment Fund
- Marc A. Williams Fund
- Roy and Margaret Williams Fund for York County
- Wolf Foundation Fund
- Earle L. Wolf Fund
- Earle L. and Evelyn T. Wolf Fund
- George A. Wolf Family Fund

**Y**
- YMCA of York and York County Early Childhood Care and Education Fund
- York Social Venture Fund
- York City Band Fund
- York City Dollars For Scholars Class of 1934 Fund
- York City Dollars For Scholars Class of 1941 Fund
- York City Dollars For Scholars Class of 19M42 Fund
- York City Dollars For Scholars Class of 1951 Fund
- York City Dollars For Scholars Class of 1959 Fund
- York Country Day School Keystone Scholarship Fund
- York County Community Foundation Agriculture and Land Preservation Fund
- York County Community Foundation Arts and Culture Fund
- York County Community Foundation Children and Youth Fund
- York County Community Foundation Community Development Fund
- York County Community Foundation Education Fund
- York County Community Foundation Embracing Aging Fund
- York County Community Foundation Emergency Relief Fund
- York County Community Foundation for the Environment
- York County Community Foundation Health and Human Needs Fund
- York County Community Foundation Management Assistance Fund
- York County Community Foundation Sustainable Energy Fund
- York County Community Foundation Vision Fund
- York County’s Fund for Special Olympics
- York Day Nursery Early Childhood Care and Education Fund
- York Factory Whistle Concert Fund
- York Federal Foundation Fund
- York High Class of 1969 Fund
- York Jewish Community Center Early Childhood Care and Education Fund
- York Machinery Company Fund
- York Revolution Community Fund
- The York Water Company Endowed Fund
- YWCA of Hanover Early Childhood Care and Education Fund

**Z**
- Jane and Jim Zarfoss Family Fund
- Mr. and Mrs. Isaac Newton Zimmerman and Dr. Nona Diehl Fund
- John and Kathryn Zimmerman Fund for York County
- John D. and Kathryn W. Zimmerman Fund
- John D. and Kathryn W. Zimmerman Fund (2)
- Kathryn W. Zimmerman Fund
- Kathryn Wolf Zimmerman Fund
- William and Patty Zimmerman Family Fund
- Harry E. and Sadie M. (Koehr) Zumbrun Fund
- Margery E. and Henry A. Zumbrun Fund
We are a collaborative community leader who searches out ideas and opinions from hundreds of volunteers. We coordinate community resources, convene expertise, propose solutions and energize leaders and philanthropists to create positive change for our community. We invest our resources of time, energy and money in addressing the issues to build a strong future.
Together with the Community Foundation we are a cohesive force set on community improvement. We assess needs, confront critical issues and drive for results.
Field of Interest Funds support broad areas of charitable interest in our community that have been selected by the Community Foundation in response to donors’ interests and community need. One example of a Field of Interest fund in action is Agriculture and Land Preservation. This Fund was created out of a deep sense of pride in York County’s agricultural roots. In 2013, the Community Foundation supported several programs and initiatives through this fund:

- Support for Agriculture Cost-Share program in collaboration with the York County Conservation District. The program helps cover the cost of implementing Best Management Practices to help farmers comply with the PA Clean Streams Law and significantly reduce the pollutants in the County’s streams, creeks, and rivers.

- Support for Envirothon, a national competitive science program whose focus in 2014 is sustainable agriculture. York County has one of the largest levels of participation in the nation with nearly 1,000 students in grades 3-12 and hundreds of volunteers participating each year.

- Support for teachers who wish to pursue a CASE-certified agriculture instructor designation through Future Farmers of America.

- Support for future farmers in their pursuit of post-secondary and graduate level agriculture education.
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CARRYING THE BALL FOR 20 YEARS
Donna Jones, Controller with the Foundation since 1994

SUSTAINERS AND FOUNDERS
Revitalization and Growth Initiative Leadership Gifts

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York Federal Savings & Loan Foundation
York International
York Newspaper Company
York Water Company
John D. and Kathryn W.* Zimmerman

Anonymous
* We remember
2011 Grant

The 2011 winner Healthy World Cafe (HWC), is an eat-what-you-want, pay-what-you-can cafe open for lunch. “Where friends meet and everybody eats” is the tag line for this unique social venture project that combines great tasting, healthy food from local farms in a welcoming environment where everyone can afford the meal. In summer of 2014, HWC will be moving to a storefront on South George Street, downtown York.
The 2013 winner YorShoppes is a pop-up retail incubator created to address the vacancies in the Business Improvement District by setting up temporary retail establishments in vacant buildings.

The 2013 winner CoWork155 (a membership based community) provides a unique work environment to entrepreneurs, telecommuters, freelancers, salespeople and employees of innovative firms in the York region.

The Parliament, the 2012 winner, is a non-profit community arts collective that operates a gallery on East King Street. The Parliament markets, places and represents a growing number of emerging local artists and continues to build on its mission of revitalizing the arts in the community.
The Women’s Giving Circle is building a community of thoughtful, effective philanthropists committed to strategic philanthropy. These women are masters at leveraging the power of information and collaboration to effect positive community change.

Time and time again the Women’s Giving Circle has been out front in responding to community problems and opportunities.

Priorities: Education, Urban Revitalization and Diversity.

MORE THAN 75 WOMEN
MORE THAN $500,000 INVESTED IN THE COMMUNITY

The York Federal Fellows in Nonprofit Community Leadership Program was created in 2006 to enhance leadership capabilities and encourage extraordinary journeys among nonprofit and government sector leaders. The program is the brainchild of Bob Pullo, retired President and CEO of the former York Federal Savings and Loan, who recognizes the value the nonprofit sector plays in creating a vibrant community.

The York Federal Fellows Advisory Committee

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Lou Castriota
Ann Davis
Kevin Lenkner
Suzanne McConkey
Tammy Miller
Joan Mummert
Robert Pullo
Michael Thow
Jane Conover, Staff

Carolyn Steinhauser, WGC Consultant

2014 Fellows
From left to right: Victoria Connor, York Bar Association and Foundation; Greg Miller, Penn-Mar Human Services, Inc; Bob Pullo, Leadership Consultant; Jason Lewis; and Anne Bahn, Byrnes Health Organization
Our high-impact initiatives focus on the community’s greatest needs by using the array of Foundation resources of leadership, expertise and grants. We begin by identifying and defining issues through public dialogue and data gathering. We explore possible solutions through research and site visits. Then we convene stakeholders to develop recommendations and collectively support the implementation of strategies.

Thanks to our investment of time, expertise and money, the ball is rolling forward to create thriving downtowns, outstanding educational opportunities and a community that is a great place to age. The grants that support these high-impact initiatives come from our Fund for York County and our Field of Interest Funds.

Total Field of Interest Fund and Fund for York County grants: $884,505
Our goal is to have 100% of students receive a premier education so they are equipped for college or career. Education of our County’s youth is the key to their future and the economic vitality of our communities. We support education from preschool through college with almost $800,000 a year awarded through our endowed funds.
Creating a Community of Support

School system asks Communities in Schools to help, we assign a site coordinator.

Site coordinator and school administration develop the plan and build a team.

Services are monitored and adjusted every year.

2013 Annual meeting speaker: Andy Smarick, Bellwether Education Partners

$316K awarded for education and scholarships

Advocated in Harrisburg for "distressed district" designation and a local Chief Recovery Officer

Loren Kroh, Board Director
Our goal is to make our county's downtowns culturally and economically vibrant. Downtowns throughout our county have the potential for historic charm combined with an invigorated economy. The thriving downtowns that emerge will include up-scale housing, cultural attractions, an enlivened retail environment, movie theaters, and restaurants, all within a community brimming with history. These amenities attract and retain employers, employees and residents to create a vibrant and sustainable York County.

Moving Plans into Action (MPA)

Hired architect for Schematic Design of Continental Square

More than 125,000 daffodils planted

4 visioning sessions

More than 170 people attending

Beautiful York Action Plan produced

Projects funded through the Fund for York County, Beautiful York and our Field of Interest Funds

2006-2011 more than 20 action items within plan were addressed

Reclaiming Continental Square

Main Street Hanover

$10K streetscape project and banners

2 public presentations to promote Continental Square designs
2013

- Implementation moved to Downtown Inc.
- $47K committed

2014

- MPA Game Plan
  - $80K promised for rail trail improvements and extension
- Community First Fund
  - $60K
  - Community investment for central Pennsylvania cities
- New Freedom
  - $5K
  - Freedom Green Community Park
- Dillsburg
  - Historic Monaghan Church
  - $10K
  - Anchor meeting and cultural center

William R. Hartman,
President and CEO
Did you know that 150,000 people living in York County are 50 years or older in age? That’s 1/3 of the county population! The Embracing Aging initiative helps assure that the perspectives of older adults are integrated into all aspects of our community. Our vision is for York County to be – and be recognized as – a great place to age and a premier model for other communities to emulate.

The Embracing Aging initiative connects experts in the community who work together to make it easier for older adults to have the quality of life they choose. There are several priority areas: culture change, community engagement, health & well-being, housing, and transportation. In addition, it supports programs and services designed to help people embrace their own aging and helps assure older adults are treated with respect.

The Hahn Home Fund is created based on a 1913 bequest in Anna Gardner’s will.

Polk-Lepson Research Group hired for data gathering & needs assessment.

86 participants in focus groups.

Ruth Garrett, Ph.D. speaker at Embracing Aging event.

Grant to Jewish Family Services to create video recordings of our wisest Yorkers; Ernie Weiss pictured.

Embracing Aging Committee is formed.

Embracing Aging: A Community Conversation event.

Hahn Home report completed.

8 focus groups more than 50 participants.
The Embracing Aging Committee is funded through a grant from the Hahn Home Fund of the Community Foundation and the Embracing Aging Field of Interest Fund.

The National Association of Area Agencies on Aging (n4a) selected the Embracing Aging Project to be one of six initiatives from around the U.S. to participate in a Livable Communities Collaborative funded by the MetLife Foundation.

When a community is “age-friendly” it benefits people of all ages. That’s why we feel this new initiative is a perfect fit in the broader mission of the Community Foundation.

Community Foundation is Keynote speaker at the OLLI’s Founder’s Luncheon on October 17th.

in attendance: the State Secretary on Aging

Cathy Bollinger, Managing Director of Embracing Aging

Mark Shea, Embracing Aging Committee Member

Embracing-Aging-Study         Making York County a Community for ALL Ages
An initiative of the York County Community Foundation

When a community is “age-friendly” it benefits people of all ages. That’s why we feel this new initiative is a perfect fit in the broader mission of the Community Foundation.

Cathy Bollinger, Managing Director of Embracing Aging

Embracing Aging Committee is funded through a grant from the Hahn Home Fund of the Community Foundation and the Embracing Aging Field of Interest Fund.
The New Birth of Freedom Council, Boy Scouts of America was formed by the merger in 2010 between York-Adams Area Council (serving Adams and York counties) and Keystone Area Council (serving Cumberland, Dauphin, Franklin and Perry counties). While the decision to formally discuss a potential consolidation of the two councils may have initially been driven by financial concerns, the study process that the Scouts conducted revealed there were other non-financial reasons for the two councils to come together. These reasons included increased organization depth at all volunteer levels, increased specialization of staff, potential for large growth of camping revenue as well as staff and back office cost savings. The Community Foundation agreed that the merger would create a more sustainable organization. This is just one of the more than 20 organizations that we have helped to form strategic alliances.

Four years after the merger, Ron Gardner, New Birth of Freedom, Scout Executive & CEO says, “The merger has gone much better than we could have ever anticipated and has already enabled our council to successfully navigate challenging circumstances, financially and otherwise. It has been very rewarding to see all of the improvements in how our council supports local Scouting programs and the unified Scouting spirit displayed by all of our volunteer leaders.”
York County Community Foundation’s top three strategic priorities are:
Advancing Education • Revitalizing Downtowns • Embracing Aging

2013 TOTAL GRANTMAKING
$2.74M

Sandy Aulbach, Grants Administrator

YCCF.ORG

VIEW ALL 2013 GRANTEES
Over the past several years, York County’s public libraries have come together to shape a common vision for library services to lead them through the 21st century. This vision inspired the York County Libraries Second Century Endowment Program to ensure the health and vitality of York County’s public libraries, which provide information and resources for lifelong learning to nearly 150,000 library members throughout the county.

The Second Century Endowment Program is sponsored by York County Library System and Martin Library. Since 2001, Martin Library has provided “seed grants” for funds to be established at the Community Foundation and challenge dollars to encourage library friends to help build the endowments with lifetime gifts and bequests.

Mason-Dixon Public Library has utilized the seed grant challenge dollars to create their endowed fund. This past year they have also created a relatively new vehicle that the Community Foundation offers Heritage Fund holders, called the Flex Fund. The Flex Fund provides the charitable organization with the opportunity to request distributions beyond the annual available spending policy.

Your local library participates in the Second Century Endowment Program:

Arthur Hufnagel Library
Collinsville Community Library
Dillsburg Area Public Library
Dover Area Community Library
Glatfelter Memorial Library
Hanover Public Library
Kaltreider-Benfer Library
Kreutz Creek Valley Library Center
Martin Library
Mason-Dixon Public Library
Red Land Community Library
Southern York County Library
Village Library
A
ACCESS-York Endowment Fund
Arc of York County Endowment Fund
Atkins House Endowment Fund

B
Bell Socialization Services Endowment Fund
Big Brothers Big Sisters Endowment Fund
Byrnes Health Education Center Endowment Fund

C
Central PA HOBY Endowment Fund
Central York Dollars For Scholars Endowment Fund
Lehman Center of Children’s Aid Society Endowment Fund
Nicarry Child Counseling Center of Children’s Aid Society Endowment Fund
Children’s Home of York Endowment Fund
Church Women United in York County Endowment Fund
Collinsville Community Library Endowment Fund
Crispus Attucks Association Endowment Fund
Cultural Alliance Endowment Fund

D
Dallastown Dollars For Scholars Endowment Fund
Dillsburg Area Public Library Endowment Fund
Dover Area Community Library Endowment Fund

E
Easter Seals Endowment Fund
Eastern York Dollars For Scholars Endowment Fund
Eichelberger Performing Arts Center Endowment Fund
Emmanuel United Church of Christ Endowment Fund

F
Farm & Natural Lands Trust of York County Endowment Fund
ForSight Vision Endowment Fund

G
Girl Scouts in the Heart of Pennsylvania Endowment Fund
Glattfelder Memorial Library Endowment Fund
Bill Goodling Teacher Scholarship Fund
Greater York Center for Dance Education Endowment Fund

H
Hanover Area Family YMCA Fund
Hanover Area Historical Society Endowment Fund
Hanover Hospital Endowment Fund
Hanover Public Library Endowment Fund
Historic Prospect Hill Cemetery Heritage Fund
Homewood Foundation Endowment Fund
Arthur Hufnagel Library Endowment Fund

J
The Janus School Endowment Fund
Jessica and Friends Community Endowment Fund
Junior Achievement of South Central Pennsylvania Endowment Fund
Junior League of York Endowment Fund

K
Katreider-Benter Library Endowment Fund
Kreutz Creek Valley Library Center Endowment Fund

L
Lancaster Theological Seminary Endowment Fund
Leadership York Endowment Fund
Leg Up Farm Endowment Fund
Logos Academy Endowment Fund
Lutheran Social Services of South Central Pennsylvania Endowment Fund

M
Make-A-Wish Foundation of South Central PA Endowment Fund
Martin Library Endowment Fund
Maryland and Pennsylvania Railroad Preservation Society Endowment Fund
Mason-Dixon Public Library Endowment Fund
Christa McAuliffe Scholarship Foundation Endowment Fund
Memorial Hospital Auxiliary Scholarship Fund
Memorial Hospital Endowment Fund
Mental Health America of York & Adams Counties Endowment Fund
Mt. Zion United Church of Christ Endowment Fund

N
New Birth of Freedom Boy Scout Council Endowment Fund
Northeastern Foundation Endowment Fund
Northeastern School District Scholarship Endowment Fund
Northeastern Senior Scholarship Endowment Fund
Northern York County Historical and Preservation Society Endowment Fund

O
Olivia’s House Endowment Fund
Otterbein United Methodist Church (Mt. Wolf) Endowment Fund

P
Penn-Mar Organization Endowment Fund
Planned Parenthood of Central Pennsylvania Endowment Fund
Preservation Pennsylvania Endowment Fund

R
Red Land Community Library Endowment Fund

S
St. John’s 1755 Fund
St. Paul Evangelical Lutheran Church Endowment Fund
Harry J. and Evelyn M. Samuelsohn Fund for Margaret Moul Foundation
Shadowfax Corporation Endowment Fund
South Eastern Dollars For Scholars Endowment Fund
South Western Dollars For Scholars Endowment Fund
Southern York County Library Endowment Fund
Southern York County Schools Dollars For Scholars Endowment Fund
Spring Grove Area Educational Fund
Spring Grove Area Scholarship Endowment Fund
Strand-Capitol Performing Arts Center Endowment Fund
Susquehanna Heritage Corporation Fund
Susquehanna Waldorf School Endowment Fund
Gretchen Wolf Swartz Scholarship Fund

T
TrueNorth Wellness Services Endowment Fund

U
United Way of York County Endowment Fund

V
Village Library Endowment Fund

W
Warehime/Myers Mansion Endowment Fund
West York Area Dollars For Scholars Endowment Fund
Windy Hill Senior Center Endowment Fund
WITF Endowment Fund

Y
YMCA of York and York County Endowment Fund
York Art Association Endowment Fund
York Benevolent Association Endowment Fund
York City Dollars For Scholars Endowment Fund
York City Little League Forever Fund
York County 4-H Endowment Fund
York County 4-H Futures Fund
York County Agricultural Society Foundation Fund
York County Bar Foundation Endowment Fund
York County Chamber Foundation Fund
York County Heritage Trust Endowment Fund (AIM)
York County Heritage Trust Endowment Fund
York County Honors Choirs Endowment Fund
York County Junior Golf Association Endowment Fund
York County Literacy Council-Hanover Endowment Fund
York County Literacy Council’s Literacy Fund
York County Parks Foundation Endowment
York County SPCA Endowment Fund
York County Youth Symphony Endowment Fund
York Junior Symphony Orchestra Endowment Fund
York Little Theatre Endowment Fund
York Rotary Endowment Fund
York Suburban Dollars For Scholars Endowment Fund
York Suburban Education Foundation Endowment Fund
York Symphony Endowment Fund
York Youth Symphony Endowment Fund
YorkArts Endowment Fund
YWCA of York Endowment Fund

YCCF.org | BUILDING ENDOWMENT
What ever your passion may be, you are part of a longstanding history of dedicated donors who have taken a thought, an instinct, a hope, and turned it into something remarkable. Thank you for your continued partnership and support!

INDIVIDUAL DONORS

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Anonymous Gift (3)
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Downtown Inc
Created 5 promotional videos celebrating a vibrant downtown
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Harry J. Rubin
David I. Sharpe
Frederick B. Shearer Jr.
S. Walter Stauffer*
Beauchamp E. Smith*
* We remember
Family-Child Resources
40 students and their parents learn new skills to help them stay in school

Windy Hill Senior Center/Windy Hill on the Campus
12,000 more square feet of space for intergenerational programs

- Daniel and Penny Gordon
- Aaron and Erin Gosser
- Allan and Diana Greene
- Elaine and Leo Gribbin Jr.
- James and Carol Groff
- Randall and Laura Gross
- Tim Grumbacher
- Ashley Grupp
- Kathryn P. Guggino
- Lynne H. Gummo

- Michael H. Hady III
- Jennifer H. Hall Davis
- Patricia Hall
- Joshua Hanky
- Marlene Harman
- Bill and Reenie Hartman
- Joseph F. Hasenfuss
- Michael and Katherine Haun
- Ken and Judy Heaps
- Jason and Karla Heberlig
- Michael C. Heidler
- William and Pamela Heiser
- Myron and Donna Henry
- John and Janice Herrold
- Jacqueline Hershberger
- Paul and Sandra Hershey
- Suzanne and Richard Hershey
- Ronald L. Hershner
- Anthony and Victoria Hinson
- Christopher and Jennifer Hinson
- William F. Hoffmeyer
- Paul and Benae Hoffnagle

- Doug Hoke
- Mary Holmes
- Anne and Benjamin A. Hoover II, MD
- Ray and Lorraine Hovis
- Carol Hovis
- Michelle Hovis & Robert Stephenson
- Clinton and Sandra Hughes
- Austin and Sara Hunt
- Sonia Huntzinger
- Angela Y. Huyghue

- Marvin and Bonnie Inscore
- Robert V. Issue
- Frank and Susan Irving III

- Larry and Susan Jacobs
- Philip James and Jim Flavell
- Kenneth and Margaret Jelonek
- Laura Jensen
- Ellen Johnson
- James and Kimi Johnson
- Mike and Ellen Johnson
- Barbara W. Johnston
- Donna B. Jones
- Leslie and Jill Jones

- Christine Kahley
- Betsy Keefer
- Horace Keesey III
- Megan Kemmery
- David E. and Beverly A. Kennedy
- David E. Kennedy
- Sean and Laura Kenny
- Jared and Ann Kieling
- Timothy and Anne Kinsley
- Anne W. Kinsley
- Robert and Anne Kinsley
- Nancy Klahold
- John and Jan Klinedinst
- Jeffrey and Judy Kochenour
- Jason and Lisa Konopinski
- Thomas and Lara Kopf
- Susan D. Krebs
- Kurt and Susan Krieger
- Loren H. and Faye W. Kroh
- John and Polly Krouth
- Jim and Gina Kruper
- Hugh and Marie Kutz

- Steven W. Lady and Sharon D. Smith
- Jane E. Landis
- Linda J. Larsen
- Gloria J. Lau
- Jeffrey and Linda Lau
- Dr. and Mrs. Samuel S. Laucks II
- Angela Lauer
- Rick and Pamela Lee

- James Leedy and Julie Conrad-Leedy
- Melanie and Terry Lehman
- John R. and Pamela A. Leonard
- Charles Levine
- Barbara C. Linder
- Wanda M. Linebaugh
- Susan D. Linton
- Jeff and Cindy Lobach
- Bambi Long
- William and Kathy Long

- Heidi K. Mammarelli
- Lynne Manchester
- Erin Mangle
- David and Mary Joann Manifold
- Stephanie Mantegna
- Aaron and Lisa Martin
- Genevieve Martin
- Holly A. Mayer
- Frances W. McCabe
- Daniel McCauley
- Suzanne and Vance McConkey
- Therese McConville
- Robin McElfatrick
- John and Kris McEligott
- Benjamin A. McClauglin
- Kevin and Denise McGovern
- Mark and Michele McKinney
- G. Steven and Linda W. McKonly
- Patrick and Jenell McKowen
- Ryan and Sara McShane
- Dex and Susan Meadows
- Daniel G. Meckley III
- Dave and Betsy Meckley
- Dennis and Debra Meckley
- Mary Meisenhelter
- Joel and Lara Menchey

2013
$14.4M IN GIFTS

Family-Child Resources
40 students and their parents learn new skills to help them stay in school

James Leedy and Julie Conrad-Leedy
Melanie and Terry Lehman
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Ryan and Sara McShane
Dex and Susan Meadows
Daniel G. Meckley III
Dave and Betsy Meckley
Dennis and Debra Meckley
Mary Meisenhelter
Joel and Lara Menchey

2013
$14.4M IN GIFTS
Red Lion Area School District
80 kindergartners benefit from technology in the classroom to enhance learning
Dirk and Julie Slack
Alice Sloan
Mark and Cynthia Slobodian
Patricia Snyder Smith
Rick and Carol Smith
Steve and Alice Smith
Shirlee J. Smolin
Alan and Amy Snook
Charles and Judith Snyder
H. Elstun Snyder Jr.
Steve E. Snyder
William and Bonnie Sowers
Laurie Anne Spagnola
Mark and Sarah Spencer
Glenn and Kelly Spinnello
Frederick A. Sprekle
Roger E. Stabiley
Sarah Bolton Stahl
Clair and Shirley Starner
Todd and Beth Staub
David and Joan Stauffer
Joan F. Stauffer
Richard and Bonnie Stecker
Jack and Peggy Stelich
Carolyn Oyster Steinhauser
Lydia Stern
Donald and Edna Stern
Nathan J. Stern
Gloria and Thomas Stern Sr.
Harlan and Isabell Stetler
Rosalie F. Stetler
David and Mary Stewart
Kenneth G. Stine
Patti Stirk and Jeff Hines
Steve and Debra Stock
Ralph and Arden Stroemer III
Paul and Courtney Stoner
Matthew Stoup and Benjamin Parthree
Seth and Bobbi Strausbaugh
Dave and Meredith Strayer
Brian and Andrea Marceca Strong
R. Norma Struckhoff
Mark and Grace Sullivan
William and Kelly Swartz
Karin Swartz
Margaret Z. Swartz
John J. Sygielski

V
Laura Vest
Robert Vest
Carl and Brenda Vizzi
Bob and Trisha Volk

W
David Wagenknecht
Carol D. Wagman
Richard E. & Carol D. Wagman
Joe and Susan Wagman
Richard and Karen Wagner
Bennell and Sandra Wallace
John R. Walsh
Justine Warfield
Carolyn F. Warman
Floyd and Anne Warner
John and Kristine Wasilewski
Mary F. Weaver
Edward and Roseanne Weinel
Eliot and Susan Weinstein
Fred A. Werner*
Michael and Julie Wheeler
Mary Ann Whelan
Mary Elizabeth Whiteley
Dennis E. and Karen Willman
Joel and Lisa Winer
Anthony and Linda Winter
Reed and Joann Winward
John U. and Charlotte S. Wisotzkey
Karen E. Wix
Coni Wolf
Cornelia W. Wolf
Frances D. Wolf
Gary and Ruth Wolf
Thomas W. and Frances D. Wolf
William T. and Cornelia W. Wolf
Michael E. Wood
Mark Woodbury
Robert and Judith Woods
Rose Marie Woodyard

Y
Keith and Bette Yanky
Thomas and Stephanie Yentsch
Frank and Debra Young

York Academy
Regional Charter School
75 fourth graders discover musical instruments
York County Conservation District
1,000 students in grades 3-12 learn about sustainable agriculture through Envirothon

Z
Justin Zartman
John and Sandra Zdanis
Geoff and Kimberly Zech
Richard E. Zerbe
Susan A. Zerbe
Morton F. Zifferer Jr.
John D. Zimmerman
*We remember

Gifts made in memory of:
Nicolo Colletti
James Donahue
Arthur J. Glatfelter Jr.
William Hoffman
Doris Kroft
Charles Miller
Richard C. Strickhouser

In-Kind Contributors
C.S. Davidson, Inc.
CoWork155
DreamWrights Youth & Family Theatre
Memorial Health Systems Corporation
New Muse Entertainment, LLC
Penn State York
Robert W. Pullo
Thomas W. Wolf
York County Estate Planning Council
York Jewish Community Center
York County Heritage Trust
York Symphony Association
Yorktowne Hotel

Estate Gifts
Estate of Richard L. Beck
Estate of Michael Alan Bose
Estate of Doris Schwartz
Estate of William H. Simpson
Estate of John T. Smith
Estate of Donald A. Swartz
Estate of Ralph Larry Williams

Corporations, Institutions and Nonprofits
Art Institute International
Barley Snyder

Partnership for Economic Development in York County, Inc.
4 new colorful trash receptacles in downtown Hanover make garbage pretty

Barton Associates, Inc.
The Beacon Charitable Foundation
Benn Law Firm
Bergdoll & Company, LLP
Jim and Judi Bergdoll Family Fund
Better York
W. Dale Brougher Foundation
Central Penn Benefits
Central Pennsylvania Leadership Seminar
County of York
Cultural Alliance of York County
Dover Area School District
First Presbyterian Church
Flying Feet Sport Shoes
Arthur & Margery Freas Charitable Remainder Unitrust
Fricton Materials, Inc.
Fulton Bank, Drovers Division
Garden Club of York
Gavin Communications LLC
GE Foundation
Glatfelter Insurance Group
Anne & Philip Glatfelter III Family Foundation
George and Beverly Glatfelter Family Donor Advised Fund of The Philadelphia Foundation
The Graham Foundation
Greater Dover Area Dollars For Scholars
Greater Houston Community Foundation
The Grumbacher Family Foundation
Historic Prospect Hill Cemetery Heritage Foundation
The Hodges Family Foundation
Russell and Eleanor Horn Foundation
Hoss’s Steak & Sea House
Junior League of York
Katherman, Briggs & Greenberg, LLP
Kerlin Family Charitable Fund
The Kinsley Foundation
Crull S. Kister Trust
Earl and Winifred Knudsen Charitable Trust
Leave A Legacy® York County
Lutheran Social Services Foundation
Maryland & Pennsylvania Railroad Preservation Society
Mavric Supply Company, Inc.
Mason Investment Advisory Services, Inc.
Mason-Dixon Public Library
Mt. Zion United Church of Christ

Northeastern Foundation
Northern York County Historical and Preservation Society, Inc.
Owings Mills GT, LLC DBA The Greene Turtle
Sports Bar & Grille
ParenteBeard LLC
PeoplesBank, A Codorus Valley Company
Perform Group, LLC
Planned Parenthood of Keystone
PNC Financial Services Group
Bob Potts Marathon Fund
rabbittransit
Reinsel Kurtz Lesher LLP
River Rock Academy
Robert Wood Johnson Foundation
Rotary Club of York
St. Paul Evangelical Lutheran Church
John Schmidt Foundation
SF & Company
Shipley Family Foundation
Shipley Group
Southern York County Schools Dollars For Scholars
Spring Grove Area Scholarship Foundation
Spring Grove High School Activity Fund
Springettsbury Township
Stagemeyer Flower Shop
Strategic Advantage Inc.
Susquehanna Waldorf School
Think Loud Development LLC
George and Dianne Thornton Private Foundation
UBS Wealth Management Employee Giving Program
United Jewish Community of York
United Way of Lancaster County
United Way of York County
Wagman Construction Inc.
Arie Knipel, Harry V. and J. William Warehime Foundation
Weinstein Realty Advisors
WellSpan Health
Wertz Family Charitable Trust
West York Area Dollars for Scholars
Roland M. and Lillian R. Whitmire Trust
Windy Hill Senior Center
Wirtz Family Fund of Baltimore Community Foundation
The Wolf Organization, Inc.
York Art Association
York County 4 H Development Council
York County 4-H Endowment
York County 4-H Swine Club
York County Economic Alliance
York County Honors Choirs
York Junior Symphony Orchestra
York Little Theatre
York Revolution
York Suburban Dollars For Scholars
The York Water Company

YCCF.org | BUILDING ENDOWMENT 39
Twenty years ago, York County Community Foundation had a bold idea: improve early childhood education for our county’s children. By advocating, collaborating, leveraging funds, and serving as an incubator, the Community Foundation helped launch a revolution in early childhood education that is still thriving 20 years later under the leadership of the United Way.

In 1994, the Community Foundation collaborated with the United Way and Penn State York to create York County’s Focus On Our Future (recently renamed FOCUS), which promoted the radical idea that quality early childhood education increases a child’s success later in life. Programs such as FOCUS quickly changed parents’ perceptions of early childcare providers. Today parents demand that childcare centers have national accreditation through education programs such as Keystone Stars, which sets levels of quality controls for centers as well as education standards for teachers, caregivers and providers.

Key to the success of FOCUS was a $500,000 grant from The Heinz Endowments, which inspired the Community Foundation’s first endowments dedicated to this goal. The Community Foundation leveraged the Heinz grant by making this money available to organizations in the form of a challenge grant. It also inspired bequests and life income gifts to support the missions of the childcare organizations. The challenge was accepted by seven York area childcare centers who established endowments to sustain their work.

Although the Community Foundation no longer manages FOCUS, the benefit of continuing to build endowment for the initiative is undeniable. Building endowment preserves and enhances the purchasing power of the fund over the long term, and is accomplished by careful stewardship and a prudent long-term investment strategy. Many of the funds at the Community Foundation have reached the point where they have granted out more than the amount used to start them. That’s the true power of endowment.
The Community Foundation maintains well-diversified portfolios that are invested with the goal to preserve and enhance the real value of these assets over time. The investment objective of York County Community Foundation can be summarized as follows:

- Preserve capital
- Strive for consistent real returns
- Preserve purchasing power by striving for long-term returns that exceed the sum of payout, fees and inflation
- Earn the highest possible return given the risk tolerance established by York County Community Foundation

The Community Foundation engages Fund Evaluation Group (FEG) and Mason Investment Advisory Services to manage the asset allocation and advise the Investment Committee on allocation strategy and investment policy.

A Socially Responsible Investment Portfolio is available for donors who prefer that option.

### Asset Allocation Target Weight

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Target Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real Estate</td>
<td>4.0%</td>
</tr>
<tr>
<td>Large / Mid Cap Equity</td>
<td>16.8%</td>
</tr>
<tr>
<td>Small Cap Equity</td>
<td>8.0%</td>
</tr>
<tr>
<td>International Equity</td>
<td>11.0%</td>
</tr>
<tr>
<td>Diversifying Strategies</td>
<td>8.0%</td>
</tr>
<tr>
<td>Cash</td>
<td>0.2%</td>
</tr>
<tr>
<td>Natural Resources</td>
<td>7.0%</td>
</tr>
<tr>
<td>Fixed Income</td>
<td>20.4%</td>
</tr>
<tr>
<td>Small Cap Equity</td>
<td>8.0%</td>
</tr>
<tr>
<td>International Equity</td>
<td>11.0%</td>
</tr>
<tr>
<td>Emerging Markets</td>
<td>12.0%</td>
</tr>
<tr>
<td>International Small Cap</td>
<td>4.6%</td>
</tr>
</tbody>
</table>

### Investment Performance Summary

<table>
<thead>
<tr>
<th>Periods Ending December 31, 2013</th>
<th>Community Foundation Core Portfolio</th>
<th>Target Weighted Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Yr.</td>
<td>16.4%</td>
<td>13.6%</td>
</tr>
<tr>
<td>5 Yr.</td>
<td>14.7%</td>
<td>11.3%</td>
</tr>
<tr>
<td>10 Yr.</td>
<td>6.7%</td>
<td>4.9%</td>
</tr>
</tbody>
</table>
### STATEMENT OF FINANCIAL POSITION

**York County Community Foundation**  
December 31, 2013 and 2012

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$106,392</td>
<td>$214,629</td>
</tr>
<tr>
<td>Investments</td>
<td>99,680,365</td>
<td>77,416,928</td>
</tr>
<tr>
<td>Contributions receivable</td>
<td>126,016</td>
<td>200,434</td>
</tr>
<tr>
<td>Beneficial interest in trusts</td>
<td>1,413,297</td>
<td>1,193,195</td>
</tr>
<tr>
<td>Leasehold improvements &amp; equipment, net</td>
<td>21,665</td>
<td>90,314</td>
</tr>
<tr>
<td>Other assets</td>
<td>176,067</td>
<td>163,880</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$101,523,802</strong></td>
<td><strong>$79,279,380</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants payable</td>
<td>$19,736</td>
<td>$147,509</td>
</tr>
<tr>
<td>Accounts payable and accrued liabilities</td>
<td>6,387</td>
<td>26,606</td>
</tr>
<tr>
<td>Liability to life income beneficiaries under split-interest agreements</td>
<td>3,619,790</td>
<td>3,456,669</td>
</tr>
<tr>
<td>Funds held as agency endowments</td>
<td>13,879,769</td>
<td>11,557,506</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td><strong>17,525,682</strong></td>
<td><strong>15,188,290</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Assets</strong> - <strong>Total Liabilities</strong></td>
<td><strong>$83,998,120</strong></td>
<td><strong>$64,091,090</strong></td>
</tr>
</tbody>
</table>

### STATEMENT OF ACTIVITIES

**York County Community Foundation**  
For the years ended December 31, 2013 and 2012

<table>
<thead>
<tr>
<th>REVENUES, GAINS AND SUPPORT</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total amounts raised</td>
<td>$14,375,962</td>
<td>$7,366,108</td>
</tr>
<tr>
<td>Amounts received for agency endowments</td>
<td>(982,739)</td>
<td>(1,631,842)</td>
</tr>
<tr>
<td>Contributions</td>
<td>13,393,223</td>
<td>5,734,266</td>
</tr>
<tr>
<td>Investment income</td>
<td>2,015,384</td>
<td>1,546,798</td>
</tr>
<tr>
<td>Investment gains (losses)</td>
<td>7,634,697</td>
<td>5,927,725</td>
</tr>
<tr>
<td>Change in split interest agreements</td>
<td>542,461</td>
<td>370,808</td>
</tr>
<tr>
<td>Other income</td>
<td>32,230</td>
<td>29,644</td>
</tr>
<tr>
<td><strong>Total Revenues, Gains and Support</strong></td>
<td><strong>$23,617,995</strong></td>
<td><strong>$13,609,241</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distributions from funds</td>
<td>2,740,019</td>
<td>2,595,305</td>
</tr>
<tr>
<td>Distributions from agency endowments</td>
<td>(402,799)</td>
<td>(330,987)</td>
</tr>
<tr>
<td>Grant distributions</td>
<td>2,337,220</td>
<td>2,264,318</td>
</tr>
<tr>
<td>Charitable programs</td>
<td>487,249</td>
<td>561,157</td>
</tr>
<tr>
<td>Total program services</td>
<td>2,824,469</td>
<td>2,825,475</td>
</tr>
<tr>
<td>Administrative and development</td>
<td>886,496</td>
<td>795,428</td>
</tr>
<tr>
<td>Total expenses</td>
<td>3,710,955</td>
<td>3,620,903</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGE IN NET ASSETS</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Revenues, Gains and Support</strong> - <strong>Total Expenses</strong></td>
<td><strong>$19,907,030</strong></td>
<td><strong>$9,988,338</strong></td>
</tr>
</tbody>
</table>

| NET ASSETS AT BEGINNING OF YEAR | 2013 $83,998,120 | 2012 $64,091,090 |
| NET ASSETS AT END OF YEAR | $101,523,802 | $79,279,380 |

The above financial information was extracted from audited financial statements. A complete audited financial statement with accompanying notes and opinion is available for inspection at the York County Community Foundation office.
Your Professional Advisor is just one member of a great team that can start the ball rolling to score all your philanthropic goals.

These 17 attorneys, accountants, financial consultants, estate planners and wealth advisors have been recognized for their commitment to our community and their work to encourage philanthropy. To see more about our Professional Advisor Recognition Society Members, visit:

YCCF.ORG/PA

HERE TO HELP YOU SCORE YOUR PHILANTHROPIC GOALS

Professional Advisor Recognition Society Members

William B. Anstine Jr., Anstine & Sparler
James K. Bergdoll, Bergdoll & Company LLP
Jon C. Countess, * CGA Law Firm
Cynthia A. Dotzel, SF & Company
Andrew Kagen, Kagen, MacDonald & France, P.C.
Nancy Klahold, National Penn Investors Trust Company
J. Ross McGinnis, Stock & Leader
G. Steven McKonly, G. Steven McKonly, PC
Steven M. Merrick, Reinsel Kuntz Lesher LLP
John D. Miller Jr., MPL Law Firm, LLP
John J. Shorb, Stock & Leader
Thomas M. Shorb, Stock & Leader
John W. Stitt, Stitt & Stitt Attorneys at Law
Harry J. Rubin, Barley Snyder LLC
W. Bruce Wallace, Stock & Leader
Michael Boustead, CGA Law, Retired and First Community Foundation Legal Counsel – YCCF Pioneer Award
Eugene “Struck” Struckhoff* – Lifetime Achievement Award
* We remember

Professional Advisor Recognition Society 2013 Inductees

James K. Bergdoll
Bergdoll & Company LLP

John W. Stitt
Stitt & Stitt Attorneys at Law

Michael Boustead
YCCF Pioneer Award
First Community Foundation Legal Counsel
CGA Law, Retired

Jack Shorb,
Board Director
WE ARE ON A ROLL
and looking forward to an exciting
2014
Independent Auditors:
Reinsel Kuntz Lesher, LLP

Affiliations:
Council on Foundations
Community Foundations for PA

Credits:
Photography: Keystone Photography
The Susquehanna Photographic

A copy of the registration and financial information of York County Community Foundation may be obtained from the Pennsylvania Department of State by calling toll-free in Pennsylvania, 1.800.732.0999. Registration does not imply endorsement.

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