What Happens When You Give To YCCF

GIVE
You, your family, business or organization make a tax-deductible gift to create or add to a charitable fund that matters to YOU.
yccf.org/how-to-give
yccf.org/donorlist

LEAD
YCCF convenes stakeholders, researches best practices and leads transformational change for a stronger York.

ENDOW
Funds are prudently invested for long-term growth, managed by professional investment advisors and a committee of local professionals.
yccf.org/financial-picture
yccf.org/fundlist

INVEST in community
YCCF volunteers evaluate projects and award grants to nonprofits for maximum impact.
yccf.org/grantlist
yccf.org/high-impact-initiatives

Fund for York County  Embracing Aging  Health & Human Needs  Children & Youth  Education  Arts & Culture  Community Development  Environment  Agriculture & Land Preservation

YCCF Areas of Interest
Academic success isn’t always about books

Pablo, a student at McKinley School in York City, doesn’t want kids to skip school because they don’t have clean clothes. That’s why he volunteers three times a week to launder clothes for classmates so they can focus on learning. A washer and dryer were donated through Communities In Schools (CIS), a nonprofit with programs in five city schools that helps students of all ages overcome barriers to learning and stay in school. YCCF knows that student success is essential to a thriving city. That’s why we committed $210,000 over three years and partnered with the United Way and other funders to bring CIS to York.

Out-of-the-box thinking adds fun to downtown

A vibrant community includes vibrant art – indoors and out – and sometimes in windows. The Parliament arts group fills vacant storefronts with eye-catching colorful “pop-up” art that inspires others to visualize the space in use – or simply to enjoy art, while promoting the individual artists who create the window. YCCF supports the holistic approach of combining art with potential business development, while delivering whimsy that adds to the arts scene in downtown. YCCF is proud to have supported The Parliament start-up with funding from YCCF’s YorIt Social Venture Challenge as well as this year’s ‘pop-up’ initiative with a grant from the Fund for York County.
Creating a legacy

Phil Winand and his wife, Sally, loved traveling for vacations and mission trips, but they always returned home to Hanover. After the unexpected death of his wife in 2014, Phil wanted to honor their shared love of their hometown. Phil, a retired Hanover pharmacist, created the Philip D. and Sally E. Winand Charitable Fund at YCCF. The fund will forever support Hanover’s greatest needs, and will also support York Hospital’s nursing department in memory of Sally, who had a long and fulfilling nursing career.

By including YCCF in his will, Phil’s legacy ensures the things that mattered to them most will be supported forever.

Clean water benefits everyone

YCCF’s Codorus Watershed Endowment focuses its grantmaking on programs that keep the Codorus, and ultimately the Chesapeake Bay, clean, and benefit homeowners like Tom Hopkins whose properties host the watershed. The Endowment recently funded the York County Planning Commission to explore the potential of creating a stormwater authority with local municipalities. Regional cooperation can lead to cost-effective ways to repair aging infrastructure and improve water quality so landowners like Tom can feel confident that “their” Codorus will remain healthy for generations to come.
Together we create a vibrant York County Farm to City Dinner in York, 2015.
vibrant York County

For More Information | YCCF.ORG
Downtown York is where everyone wants to be

York’s downtown has grown by leaps and bounds in the past several years. New shops, restaurants, and businesses are popping up everywhere. The latest transformation is happening with the West Market Street revitalization project, which includes the iconic Woolworth Building. Led by Josh Hankey, president of Royal Square Development and Construction (RSDC), the project plans include apartments, retail space, restaurants, and new parking. YCCF supports this project through its Social Impact Investment Fund, and has seen gifts to the fund increase as donors want to be part of creating a vibrant downtown that anchors our county.

Agriculture is a way of life in York County

Everyone who knew John Smith knew how much he loved the York Fair and the farming way of life. He spent his life at Penn State Cooperative Extension working to sustain the future of agriculture. That is why he created a fund in 2005 at YCCF to benefit the Fair. He enjoyed seeing his gift at work and he knew he could do more, so he made a $3 million gift to YCCF through his will that cemented his and his wife Paige’s legacy forever. With John’s gift, “America’s First Fair” will live on for another 250 years.
Everyone wants to age well
At 88, Olivia Brown lives in her own home and likes staying active. She recently participated in a program through Crispus Attucks, September House, and the York JCC that provided nutritional advice and physical activities specifically designed for older adults. YCCF supported the program through a collaborative grant from its Hahn Home Fund for Embracing Aging, which works to make York County a great place to age. YCCF encourages local nonprofits to work together in new ways to help older adults live longer and stronger in the place they call home. After all, no matter our age, there’s no place like home!

Spreading acts of kindness so children can learn
John and Maria Polli had two “lightbulb” moments. The first was at a school sporting event, where they noticed kids without proper footwear. The second was when they realized they were among those who helped others only during the holidays. After they sold their York school bus company, they began to spread small acts of kindness, such as lunch money, clothing, or even fees for sports or music programs, to middle schoolers who usually went without.

The Pollis discovered a way to sustain their support of school children when they endowed the John and Maria Polli Family Fund at the Community Foundation in 2015. Added bonus – John and Maria use the fund to teach their children about giving.
Why partner with YCCF?

**Expertise**
- Professional charitable advice
- Broad community knowledge
- Prudent investment strategies

**Personal Service**
- Accessible local staff
- Responsive to your needs and interests
- Flexible giving options

**Commitment to York County**
- Advance positive community improvement
- Support reinvestment in local economy
- Stay connected to your home town

**Staff**

Jane M. Conover  
President and CEO

George M. Dvoryak  
Vice President, Finance and Operations and CFO

Lise Levin  
Vice President of Community Investment

Bryan K. Tate  
Vice President and Chief Development Officer

Patricia S. Azriel  
Director of Communications

Cathy A. Bollinger  
Managing Director of Embracing Aging

Layla A. Boyce  
Grants and Scholarship Program Administrator

Donna B. Jones  
Controller

Angela M. Lauer  
Development Officer

Michele T. McKinney  
Financial Administrator

Elyse N. Pollick  
Community Investment Officer

Eydie A. Wise  
Administrative Assistant

Legal Counsel
Alex E. Snyder, Esq.  
Partner
Barley Snyder

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Board Chair 2016-2018  
Retired  
York County Community Foundation

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Immediate Past Board Chair 2014-2016  
President  
Graham Capital Company

Jeffrey D. Lobach Esq.  
1st Vice Chair  
Partner  
Barley Snyder

Elizabeth F. Carson  
2nd Vice Chair  
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Fulton Bank

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Vice President, Wealth Management  
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Law Office of Carl E. Anderson

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WellSpan Health

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CGA Law Firm

Joseph P. Clark II, Esq.  
Vice President & General Counsel  
The Stewart Companies

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President and CEO  
York County Community Foundation

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Chief Financial Officer & Chairman of the Board of Directors  
C.S. Davidson, Inc.

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Dean of Academic Affairs  
York College of Pennsylvania

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Central Penn Benefits

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York Traditions Bank

Michael C. Haun  
Investment Strategist Portfolio Manager  
PeoplesBank, A Codorus Valley Company

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Stock & Leader, LLP

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President and CEO  
Susquehanna Real Estate

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Vice President Development  
Kinsley Construction, Inc.

Susan D. Krebs  
Community Volunteer, Board Director  
York Academy Regional Charter School

Lori O. Mitrick  
Adjunct Professor  
York College of Pennsylvania

John M. Polli  
President & Founder  
JMP Consulting

Scott C. Rogers  
President  
The Glatfelter Agency/ Susquehanna Agents Alliance

William S. Shipley III  
President  
Shipley Group

John J. Shorb, Esq.  
Partner  
Stock & Leader, LLP

Patti S. Stirk  
President/CEO  
Star Systems Engineering, Inc.  
dba SMALL STAR Art House

Joseph G. Wagman  
Chairman & CEO  
Wagman Construction Inc.

Daniel Waltersdorff  
President and CEO  
Barton Associates

Claire S. Weaver, CPA  
Shareholder  
SF & Company
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. In addition, Commonfund manages our Private Capital investment program. A Socially Responsible Investment Portfolio is available for donors who prefer that option.
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.

### STATEMENT OF FINANCIAL POSITION

<table>
<thead>
<tr>
<th>York County Community Foundation and Affiliates</th>
<th>December 31, 2015 and 2014</th>
<th>2015</th>
<th>2014</th>
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<tr>
<td><strong>ASSETS</strong></td>
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<td>$128,119,418</td>
<td>$109,343,414</td>
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<td>Cash</td>
<td>$225,706</td>
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<td>Investments</td>
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<td>106,750,169</td>
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<tr>
<td>Contributions receivable</td>
<td>121,507</td>
<td>92,122</td>
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<td>Beneficial interest in trusts</td>
<td>3,331,771</td>
<td>1,215,715</td>
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<td>Leasehold improvements &amp; equipment, net</td>
<td>16,643</td>
<td>27,913</td>
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<td>Cash surrender value of life insurance</td>
<td>1,160,899</td>
<td>1,092,412</td>
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<td><strong>LIABILITIES</strong></td>
<td></td>
<td>$20,290,393</td>
<td>17,844,504</td>
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<td>Grants payable</td>
<td>$95,425</td>
<td>$173,715</td>
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<td>Accounts payable and accrued liabilities</td>
<td>119,275</td>
<td>15,409</td>
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<tr>
<td>Liability to life income beneficiaries</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>under split-interest agreements</td>
<td>2,943,179</td>
<td>3,422,511</td>
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<tr>
<td>Funds held as agency endowments</td>
<td>17,132,514</td>
<td>14,232,869</td>
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<td><strong>NET ASSETS</strong></td>
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<td>$107,829,025</td>
<td>91,498,910</td>
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<td></td>
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<td>$128,119,418</td>
<td>$109,343,414</td>
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### STATEMENT OF ACTIVITIES

<table>
<thead>
<tr>
<th>York County Community Foundation and Affiliates</th>
<th>2015</th>
<th>2014</th>
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<tbody>
<tr>
<td><strong>REVENUES, GAINS AND SUPPORT</strong></td>
<td></td>
<td></td>
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<tr>
<td>Total amounts raised</td>
<td>$11,491,005</td>
<td>$11,398,531</td>
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<td>Amounts received for agency endowments</td>
<td>(4,437,506)</td>
<td>(1,244,526)</td>
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<td>Contributions</td>
<td>7,053,499</td>
<td>10,154,005</td>
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<td>Investment income</td>
<td>1,995,257</td>
<td>1,770,941</td>
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<td>Investment gains (losses)</td>
<td>(6,262,329)</td>
<td>(462,457)</td>
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<td>Change in split interest agreements and agency endowments</td>
<td>(328,850)</td>
<td>344,509</td>
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<td>Other income</td>
<td>84,379</td>
<td>31,003</td>
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<td></td>
<td>2,541,956</td>
<td>11,838,001</td>
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<tr>
<td><strong>EXPENSES</strong></td>
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<tr>
<td>Program Services:</td>
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<td></td>
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<tr>
<td>Distributions from funds</td>
<td>4,438,835</td>
<td>3,589,132</td>
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<td>Distributions from agency endowments</td>
<td>(685,361)</td>
<td>(593,912)</td>
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<td>Grant distributions</td>
<td>3,753,474</td>
<td>2,995,220</td>
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<td>Charitable programs</td>
<td>553,598</td>
<td>516,810</td>
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<td>Total program services</td>
<td>4,307,072</td>
<td>3,512,030</td>
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<td>Administrative and development</td>
<td>887,445</td>
<td>825,181</td>
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<td>Total expenses</td>
<td>5,194,517</td>
<td>4,337,211</td>
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<td><strong>CHANGE IN NET ASSETS</strong></td>
<td>(2,652,561)</td>
<td>7,500,790</td>
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<td><strong>TRANSFER OF NET ASSETS FROM</strong></td>
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<td>MEMORIAL HEALTH SYSTEMS FOUNDATION</td>
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<td><strong>NET ASSETS AT BEGINNING OF YEAR</strong></td>
<td>91,498,910</td>
<td>83,998,120</td>
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<td><strong>NET ASSETS AT END OF YEAR</strong></td>
<td>$107,829,025</td>
<td>$91,498,910</td>
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</tbody>
</table>

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