The Luzerne Foundation 2016 Annual Report

One Hundred Million Reasons to Celebrate
Reaching A Grantmaking Milestone

Celebrating 22 Years of Being... Here for Good.™

THE LUZERNE FOUNDATION
140 Main Street, 2nd Floor • Luzerne, PA 18709

Phone: 570.714.1570 • Toll Free: 877.589.3386 • Fax: 570.300.1712 • www.luzfdn.org
Dear Community Friends,

As we celebrate this monumental milestone of making $100 million in grants since our inception, it’s important to take a moment to appreciate how essential each dollar has been in creating positive change for a brighter and better tomorrow locally, nationally and globally.

Because of these grants, nonprofit organizations have been able to improve the lives of Luzerne County residents by doing such things as: creating parks for children to have a safe place to play; initiating and sustaining health care programs that provide necessary medical and dental services to under and uninsured individuals; financially supporting students seeking higher education to achieve their goals with various scholarships; providing free arts and culture activities for all ages to enjoy; preserving historic landmark community treasures; and ensuring that social service organizations have the vital resources they need to properly care for those in need.

The Luzerne Foundation has made tremendous strides over the past 22 years in terms of growth, both financially and in the number of funds it manages, numerous collaborations with other nonprofits and charitable organizations, as well as beneficial partnerships to ensure that the needs of the community are met. We will continue to strive to achieve new milestones and extend our reach throughout the region and beyond.

None of this would be possible without your help. The Foundation extends a sincere “thank you” to its fund holders, board of directors, friends and donors who make all of this happen. You truly make a difference!

Here for Good.™

Michael Weaver, Board Chairman
The Luzerne Foundation is a community foundation, but what does that mean? In simple terms – We are a philanthropic leader, a community resource and a financial steward. The Luzerne Foundation supports donors with their charitable giving, helping them invest strategically in causes they care about and in ways that make a difference in our community. However, unlike other organizations, a community foundation is focused on developing funds that will live on in perpetuity providing support to the community for generations to come. That is why we are, Here for Good.™

$100,000,000
One hundred million reasons to celebrate

Reaching a grantmaking milestone

We have 100 million reasons to celebrate, but for now we’ll focus on just a few that help identify The Luzerne Foundation’s mission and purpose:

Our Grantmaking: Since our inception in 1994, we have awarded more than $100,000,000 in grants from more than 300 funds that represent seven distinct fields of interest. All of these components work in concert to create a healthy, vibrant community. Without Social Services, Education and Scholarships, Arts and Culture, Health and Wellness, Youth Issues, Historic Preservation and the Environment, and Neighborhoods and Community Development, our community would not be sustainable and opportunities for growth and development would cease.

Our Leadership: As a philanthropic leader in our community, it is also our mission to offer information and resources. The professional staff at The Luzerne Foundation is very knowledgeable about the various programs and services provided by nonprofit organizations in our region and has access to national and regional organizations through which almost any donor question can be addressed.

Our Commitment to Growth: We provide educational seminars covering trends in philanthropy, tax and legislative changes, and other pertinent topics free of charge to the community. By partnering with other local organizations such as The Nonprofit & Community Assistance Center (NCAC) and Northeastern Pennsylvania Chapter of the Association of Fundraising Professionals (AFP), respected experts in the field will make their way to our community. The Luzerne Foundation has always acted as a catalyst to bring diverse groups together to address local needs and foster greater collaboration. The Foundation is in a unique position to deepen its collaborative efforts across our community. Our extensive knowledge of diverse local needs and of the nonprofit organizations working to address them, positions The Foundation as a logical clearing house to promote efficient use of resources and effective communication. Together we can do so much more. With nearly $32 million in assets, The Foundation is uniquely positioned to good today... and tomorrow.
Lorine Angelo Ogurkis is the proud mother of five children, two formerly in foster care. After struggling and grieving with infertility issues for 7 years, Lorine’s best friend and co-founder PA State Representative Tarah Toohil, persuaded Lorine to consider adoption from foster care. Within two months of filing the paperwork, they were blessed with the phone call that forever transformed their lives! A baby boy, Michael Joseph, was born and needed a home! Lorine’s husband’s name is Michael Joseph! Michael and Lorine also opened their hearts and home to Brittany, a beautiful young lady who aged out of foster care and was not provided the permanent family a child so desperately needs.

Lorine was prompted through her experiences with the child welfare system to provide hope and encouragement to the many people struggling to create “their family” and connect them with the many children placed into foster care due to issues of neglect, abuse, and abandonment. It is her mission to ensure children in foster care are not the “forgotten ones.” Her life mission is to change society’s perception of children in foster care and at the same time elevate each child’s experience in child welfare to that of the superstars and VIP’s she believes they truly are. Lorine encourages others locally to foster and adopt children in foster care-believing every child deserves a ‘forever home.”

Lorine co-founded Brandon’s Forever Home along with State Representative Tarah Toohil. The 501c3 non-profit foundation operates out of a historic 1907 Georgian Mansion located in the city of Hazleton. The home is the grandest home, chosen to represent the grandest children in the child welfare system. Children who visit Brandon’s are able to shop free of charge in boutique rooms developed for their age group. They are also able to participate in activities such as the arts, dance class, music class, etc. Brandon’s Forever Home is proud to say that this year they sponsored two little ones, age 4, in private education.

Lorine Angelo Ogurkis was born and raised in Hazleton, PA and is the daughter of Richard and Claudette Angelo. She is a graduate of Bishop Hafey High School. She obtained a Bachelor of Science Degree from Marywood University and a Juris Doctorate Degree from Penn State University-The Dickinson School of Law located in Carlisle, PA. After completing law school, Attorney Ogurkis returned to the area and has been employed by Eagle Rock Resort since 2002. She is Vice-President of Double Diamond and Eagle Rock Resort-Associate General Counsel. She is admitted to practice by the Supreme Court of Pennsylvania to the bar of the Commonwealth of Pennsylvania and the State of New York. She is also an Adjunct Faculty Member for Luzerne County Community College.

Lorine and Michael currently reside in Conyngham, PA with their 5 children, Brittany, Dyllan, Delainy, Julia and Michael Jr.

“There are no unwanted children, just unfound families.” ~ The National Adoption Center
Mary Belevino Community Service History

Since 2000, The Luzerne Foundation has honored Luzerne County residents and groups who have made a significant positive impact on our community. The Mary Belevino Community Service Award is the Foundation’s highest tribute as this recognition reflects the unwavering dedication, commitment and spirit of its namesake. The 2015 Mary Belevino Community Service Award is presented to Lorine Angelo Ogurkis.

Past Recipients of the Mary Belevino Community Service Award

2000 - Joseph DeVizia
2001 - Wallace Stettler* & Daniel Nulton
2002 - Lt. Col. Juan De Rojas, M.D.
2003 - Msgr. Michael J. Delaney & Dr. Michael MacDowell
2004 - Frank H. Belevino “The First Decade Award”
2005 - Operation Thank You!
2006 - Frederick J. Bloom, Jr., M.D.
2007 - Alexander (Lex) and Jennifer Sloot
2008 - Rabbi Larry and Gerri Kaplan
2009 - Rusty Flack (Deceased)
2010 - Richard Maslow
2011 - David W. Kistler, M.D. (Deceased)
2012 - Michael & Kathleen Hirthler
2013 - Sisters of Mercy, Dallas, PA
2014 - Founding Board Members of The Luzerne Foundation
2015 - Kathleen Button

“We make a living by what we get. We make a life by what we give.”
Winston S. Churchill

www.luzfdn.org The Luzerne Foundation Annual Report
Opportunities for Nonprofit Organizations

**Forums:** Each March, in lieu of a traditional spring grant cycle, The Luzerne Foundation hosts a Nonprofit Forum in which eligible Luzerne County 501(c)3 nonprofit organizations are invited to make a five minute presentation on their current needs and challenges to The Foundation’s Grants Distribution Committee, Foundation leadership, multiple donors and friends, and other foundations and guests. This chance for nonprofits to explain, from their perspective, their most pressing needs and how they are planning to address them. The Grants Distribution Committee evaluates each of the presenters and after careful deliberation, grants are awarded. In addition, this year, 7-$1,000 field of interest bonus grants were awarded to one organization representing each of the following areas: Arts and Culture; Neighborhoods and Community Development; Education; Social Service; Health & Wellness; Historic Preservation and the Environment; Youth Issues. An email notification will be sent to all Luzerne County Nonprofits in January 2017 announcing the date and location of the 2017 Forum.

**Seminars:** Each year, The Luzerne Foundation offers two free seminars in May, on the day of its Annual Meeting. A “Lunch & Learn” seminar is hosted by The Luzerne Foundation in collaboration with AFP NEPA Chapter and the Nonprofit Community Assistance Center (NCAC). This seminar is geared to nonprofit professionals and board members.

Opportunities for Professional Advisors

In January of 2016, The Luzerne Foundation, in conjunction with The Wilkes-Barre Law & Library Association and The Northeastern Chapter of the PICPA, offered a seminar exclusive to Professional Advisors. The event, held at the Westmorland Club, offered lunch and a session presented by Clifford Scott Meyer, Partner of Montgomery McCracken entitled, “Leaving an IRA to your heirs-How adding a charity helps them.” CLE and CPE credits were offered. Plans are in motion for 2017. Watch for details at www.luzfdn.org.

In keeping with our tradition, on the afternoon of our Annual Meeting, The Foundation, in conjunction with the Wilkes-Barre Law and Library Association and the Northeast Chapter of the PICPA offers a seminar geared to financial advisors, attorneys & CPAs. CLE and CPE credits are offered. It is our honor and privilege to be a facilitator for our community of professional advisors.

**Questions? call us at 570.714.1570**
...Grantmaking Funds of The Luzerne Foundation...

These Funds support general purpose and program grants. Notifications are sent to over 800 nonprofits throughout the region in the fall each year. The Luzerne Foundation’s Grants Distribution Committee evaluates the submitted grant applications on the basis of relevance, impact, numbers of people served and benefit to the overall welfare of the community. All monies awarded serve the people of Luzerne County.

Benjamin Franklin Trust
Ben Franklin practiced what he preached! “A Penny Saved is a Penny Earned.” Benjamin Franklin’s legacy lives on in Luzerne County through The Luzerne Foundation. In his will, Franklin directed that after 200 years, half of the accumulated funds of his estate go to the State of Pennsylvania to be used for whatever the public officials felt was necessary. The State Legislature split the money among most of the community foundations across the state. The Luzerne Foundation’s $30,000 “Ben Franklin Trust” predominately benefits young people and educational programs within the county.

Daylene Burnside Administrative Endowment Fund
This Fund was named in honor of Daylene Burnside, the first Executive Director of The Luzerne Foundation, serving from its inception in 1994 through June 2000. This administrative fund helps to defray a portion of the operational expenses of The Foundation such as employee expenses, phone, rent, postage, etc. The intent of this Fund is to allow The Foundation to be as self-sustaining as possible, with cost-effective financial management, administration, tax reporting and audits for those funds established within The Foundation. This Fund is intended to maximize the quality and efficiency of philanthropy so to maximize the good for the community. All distributions from the Administrative Endowment Fund are used to defray operational expenses of The Foundation. Contributions are always encouraged.

Celebrity Luncheon Fund
Celebrity Luncheon was a program established in 1994 to enrich and enhance the cultural life of our community. The program brought four nationally recognized speakers to the area each year. The Fund was established from program proceeds. Grants support education, environmental preservation, economic development, and encouragement of the Arts in Wilkes-Barre, Scranton and Hazleton areas.

The Fund for Luzerne County
This was the very first fund of The Luzerne Foundation. The Founding Board Members of The Foundation felt that it was extremely important that The Foundation have a pool of unrestricted or general purpose assets in order to best serve the various, changing and urgent needs within Luzerne County.

This Fund accepts grant applications from nonprofit organizations within or primarily serving the residents of Luzerne County. The Fund makes grants to where our Grants Distribution Committee and our professional staff determine our community’s needs are most significant. Donors who chose to give to unrestricted funds give to the future needs of the county, no matter what those needs may be. Contributions are always encouraged.

The Health Fund of The Luzerne Foundation
The Health Fund grew out of a collaborative effort by area hospitals and health care providers to improve the health of persons in our broad community. In the mid to late 90’s, area hospitals and other health care organizations joined together in a regional effort to study and evaluate the most pressing health care needs of our population. This collaboration resulted in a bi-county program focusing on prevention and wellness called The Healthy Northeast Initiative.

At the same time, leadership from several area health care organizations including Wyoming Valley Health Care System, Mercy Health Partners and Hospice Community Care committed to supporting this effort and came together to form the Health Fund of The Luzerne Foundation. Each year grants for innovative and collaborative programs are given to area agencies that are working to improve the health and wellness of persons in our community.

Historic & Landscape Preservation Fund
The Historic and Landscape Preservation Fund provides grants to support activities within this field of interest. This fund is specifically dedicated to historic and land preservation within the entire county. Contributions are always encouraged.

Maslow Fund for the Arts
The Fund for the Arts was created to encourage and develop skills in the visual, graphic and performing arts. The role of the fund is to find essential ways to support and encourage artists of all ages and abilities - thereby enriching the community and homegrown creative endeavors. The Maslow family provided initial funding, but all who are interested in developing and nurturing the artistic opportunities and talents of Luzerne County residents are encouraged to contribute.

McGowan Fund
This Fund was established by Msgr. Andrew J. McGowan during his life to support a multitude of organizations in Northeastern Pennsylvania. Monsignor delegated to The Luzerne Foundation primary discretion over distributions because of his trust in the organization’s knowledge of the often changing and most pressing needs in Luzerne County.

www.luzfdn.org
Youth Advisory Committee (YAC)

2015-2016 YAC Group
24 Students Representing 9 Area High Schools

Beyza Akinci, Wyoming Seminary
Paige Allen, Wyoming Seminary
Lauren Anderson, Wyoming Seminary
MacKenzie Bilbow, Wyoming Area
Grayson Butcher, Wyoming Seminary
Andrew Casper, Holy Redeemer
Sabrina Chan, Hanover Area
Maryann Chapin, Hanover Area
Sean Connelly, Hanover Area
Zachary Corey, Lake-Lehman
Alexis Davison, Holy Redeemer
Joshua Frankevich, Dallas
Loran Garnett, Pittston Area
Rachel Jones, Holy Redeemer
Johnny Kehl, Wyoming Seminary
Rachel Malak, Lake-Lehman
Marina Malcolm, Lake-Lehman
Olivia Minzola, MMI
Benjamin O’Connell, Dallas
Michaela O’Connell, Dallas
Sophia Polgar, Wyoming Seminary
Ashleigh Rose, Pittston Area
Katherine Sklarosky, Crestwood Area
Isabelle Updike, Holy Redeemer

YAC’s Mission:
To empower high school youth to identify community needs and help fund them responsibly.

Our generous sponsors:

Charities that collectively received $16,000 from YAC

Wilkes-Barre YMCA with Team Allen
Women’s Resource Center with Team Casper
Wyoming Valley Children’s Association with Team Davison
Hazleton Integration Project with Team Jones

For more information about YAC and how to apply, visit www.luzfdn.org or call 570.714.1570.
Grants Since Inception

$292,000 given to date

2001 - $10,000 grant for 28 ‘Follow Your Dreams’ motivational presentations by Robb Armstrong at 8 local high schools

2002 - $10,000 grant to Diamond City Partnership for Downtown Wilkes-Barre revitalization

2003 - $10,000 grant to Candy’s Place, a community support center for cancer patients and their loved ones

2004 - $15,000 grant to ‘Friday’s Child’, a program for autistic children and adults at the Jewish Community Center, Wilkes-Barre

2005 - $20,000 to McGlynn Center for educational programs for at-risk children in Wilkes-Barre

2006 - $25,000 to Luzerne-Wyoming Counties’ Drug and Alcohol Program for prevention services delivered in classrooms at all public school districts in Luzerne County

2007 - $30,000 grant to Volunteers in Medicine, a program providing health care services to the ‘working poor,’ and under-insured area residents

2008 - $30,000 grant to Care and Concern clinics in Pittston for facilities enhancements

2009 - $22,000 grant to Ruth’s Place to assist with renovations and repairs to the women’s homeless shelter

2010 - $20,000 grant to Family Service Association for ‘Help Line’, a 24/7 Help Line, Family Service Association of Wyoming Valley’s information and referral program

2011 - $20,000 grant to CEO-Commission on Economic Opportunity to support the ‘Dinners for Kids’ Program.

2012 - $20,000 grant to the Anti-Bullying Coalition of Luzerne County

2013 - $20,000 grant to Family Service Association of NEPA – ‘Help Line –PA 211 Transition’

2014 - Our first-ever tie! $10,000 each to Ruth’s Place, Emergency Shelter for Women and CEO/ Weinberg Regional Food Bank Monsignor Andrew J. McGowan Center for Healthy Living

2015-$20,000 grant to Commission on Economic Opportunity to support the Food 4 Kids Weekend Backpack program.

2016-Where do you see the need?

The Millennium Circle Fund
of The Luzerne Foundation

The Millennium Circle Fund of The Luzerne Foundation was created as a special group of donors whose one-time gift or multi-year pledge of $2,000 play a pivotal role in helping The Luzerne Foundation identify significant unmet or underserved community needs. The ultimate goal is to have 2,000 members and a fund that will present grants to our community totaling $200,000 or more each year.

Each member of The Millennium Circle serves as the eyes and ears of The Foundation and annually recommends areas of need and nominating causes and programs. All of the many nominations are reviewed by the Millennium Circle Advisory Committee which chooses finalists to be presented at the Millennium Circle annual lunch meeting. Every member has a vote and, because of the pooling of gifts, their initial donation turns into a substantial grant that makes a large impact in the community.

A Millennium Circle donor can be an individual, a family, a business or a civic group. Membership continues in perpetuity as gifts continue to benefit the community for generations to come. To join, simply make a one-time gift of $2,000 or commit to paying that amount over a multi-year pledge. You will never be asked for additional contributions to the Millennium Circle. But we do encourage you to invite others to join. To join the Millennium Circle or to see a current list of members visit our website at www.luzfdn.org.

LOCAL PEOPLE identifying LOCAL NEEDS providing LOCAL SOLUTIONS

Join us for our Annual Luncheon on Thursday, October 27, 2016 beginning at 11:30 PM at Genetti Hotel & Conference Center in Wilkes-Barre
Donor Advised Funds

A donor advised fund, or DAF, is a philanthropic vehicle that an individual or family may establish at The Luzerne Foundation. It allows donors to make a charitable contribution, receive an immediate tax benefit and then recommend grants from the fund over time. An easy way to think about a donor advised fund is like a charitable savings account: a donor contributes to the fund as frequently as they like and then recommends grants to their favorite charity when they are ready. Many donor advised funds appoint a successor advisor so that the original intents of the donor are carried through successive generations.

The Jamie Baker Memorial Fund...NEW!
The Charles & Denny Barber Family Fund
James E. Bell & Constance L. Bell Fund
Stuart M. Bell/Luzerne Products, Inc. Fund
Bella Grazi Fund
The Ignaz, Tekla & Leonard M. Bielski Family Fund
The Berkshire Asset Management Fund
Bevevino Family Fund
Joe & Jeanne Butcher Family Fund
Marvin Carkhuff Memorial Fund
Brandon J. Case Memorial Fund
Celtic Hospice Community Care Fund
The Constellation Fund
Crisic Family Fund
Darte-Dartling Fund
The Dawe Consulting Fund...NEW!
The Dowd Family Charitable Fund
The David P. Dutko Memorial Fund...NEW!
The EBay Employee Fund...NEW!
Allen & Mary Erwine Family Hospice Fund
Flack Family Fund
Harold & Jean Flack Family Fund
The Friedman Family Charitable Fund
Gus & Val Genetti Fund
Lou Goeringer Family Fund
Omar D. Hamilton Fund
The Stewart & Sharon Harry Fund
Hazleton Kiwanis Club Charitable Fund
Frank M. Henry Family Fund
Michael & Kathleen Hirthler Fund
Insalaco Family Fund
The Allan S. Karaffa Memorial Fund
Clayton & Theresa Karambelas Fund
Ron Knouse Fund
Ken & Ann Krogulske Family Fund
Lefkowitz Family Fund
Logos Fund
The John F. Magagna Family Charitable Fund
The Makarios Fund
The Shawn C. Malone Memorial Fund

The Millennium Circle Fund
The Miner-Shoemaker Fund
The Libby K. Morris Remick Fund
The Robert A. Mugford Family Fund
The Palko Family Fund
The Corrine Pawling Family Endowment Fund
John Glenn Popple Memorial Fund
RJACK Fund
The Ruckno Family Charitable Fund
Paul & Mary Jo Rushin Fund
The Bernice Sakaduski Memorial Fund...NEW!
Jason Schilling Memorial Fund
The Nancy & Edward Shafer Family Fund
The Shafer Family Fund
Security Savings Charitable Fund
The Dr. Jen’s Hope Fund
Shekinah Fund
John & Barbara Sobeck Charitable Fund
Solid Cactus Cares Fund
The Straub Family Fund
The Robert S. Tippett Family Fund
The Weinstock Family Fund
Wyoming/West Wyoming Lions Club
The Bill & Sandi Williams Fund
James and Regina Yates Fund
The YAC (Youth Advisory Committee) Fund
Yudichak Family Endowment Fund
Yudichak Family Lighthouse Annual Fund
Designated Funds

Designated Funds are component funds whose beneficiaries have been specified by the donor when the fund is established. The Luzerne Foundation assumes the oversight responsibility for ensuring that these funds are distributed as the donor intends. Many designated funds name a number of specific organizations. Designated Funds can be established by an individual or couple, a family, a business or any other group of people with shared charitable interests. Designated Funds allow you to personally receive a tax deduction, and at the same time benefit your community by advising the Foundation of your charitable intents in perpetuity.

Back Mountain Police Association
Concerned Parents of Hazleton Area Fund
Coughlin Blue-Red Fund
CSC/Joe DeVizia Family Fund
CYC/ Parente Family Fund
Daylene Burnside Administrative Endowment
Disaster Recovery Coalition Fund
Rusty Flack Memorial Garden
at Grace Episcopal Church
The Friends of Wintersteen Carousel Fund
FunFest Fund of Greater Hazleton
Chamber of Commerce
G.A.R. Blue-Gray Fund
Georgetown Settlement Camp Fund
Hazleton Integration Project
Irem Temple Restoration & Preservation Fund...NEW!
Loyal Patriots of America Fund for Pittston
LCCEA Food & Facts Fund
Luzerne County Historical Society Funds
   LCHS – Elma C. & Bessie B. Bishop Book Fund
   LCHS – Elma C. & Bessie B. Bishop Fund
   LCHS – Dorothy D. Darte Fund - Swetland House
Leadership Wilkes-Barre Funds
   LWB - Kline Scholarship Fund of Leadership Wilkes-Barre
   LWB - Sue Kline Kluger Leadership Excellence Fund
   LWB - McGowan Leadership Fund
Lions of 14W Fund

Luzerne Intermediate Unit 18 Funds
   The LIU 18 - Education Fund
   The LIU 18 - Special Education Fund
   The LIU 18 - Behavioral Health Fund
   The LIU 18 - Student Activities Fund

Meadows Nursing Center – Ecumenical Enterprises
E. L. Meyers Blue-Gold Fund
NEPA Chapter of AIA Lecture Pass-Through Fund
NEPA Philharmonic/Flack Family Fund
Reverend Joseph Streit Fund
Shickshinny Forward Fund
Stoddartsville Preservation Society Fund
Tri-Centennial Fund of 2076

The Turri Funds
   The Joseph A. Turri ‘45 Library and Learning Center Fund
   The Barbara L. Sowers & Joseph A. Turri ‘45 Music, Drama, and Fine Arts Fund
   Beniamino & Ernesta Turri Sr. Faculty Chair in Language Fund...NEW!

William J. & Constance K. Umphred Fund
Vital House Fund – HASD Fund
Wyoming Valley West School District
   WWV - Athletic Fund
   WWV - Facilities Fund
   WWV - Special Education Fund
   WWV - Technology Fund
Sarah “Sally” Yudichak Endowment Fund

For more detailed information about our funds visit www.luzfdn.org.
No question about it, $100 million is a lot of money! But even more important than the amount of money is the impact of the services and systemic change accomplished through focused grantmaking and collaborative efforts.

When all of these elements combine, our area nonprofit organizations are strengthened and our community is stronger as a result.

This is only made possible by the gifts of friends, donors and fundholders of The Luzerne Foundation and caring people like you. We are grateful for their support and honored to be of service to our community.

We have one hundred million

..."recreation activities are available for all to enjoy."

..."the arts are made available to low income individuals."

..."agencies offer early intervention services for children with special needs."

..."caring resources provide early programs get low income children on the right track."
Nonprofit organizations typically fall within seven fields of interest:

- Social Services
- Health & Wellness
- Arts & Culture
- Historic Preservation & the Environment
- Neighborhoods & Community
- Development
- Youth Issues
- Education & Scholarships

When these seven areas are represented our community is healthy, and that truly is a reason to celebrate!

For more detailed information visit www.luzfdn.org or call 570.714.1570.
Field of Interest Funds

These funds focus on areas of special interest to the donor or groups. Grants from these funds are made to meet community needs within that special area of concern, such as the arts, the environment, health and wellness, children’s issues, and education. These funds are flexible to meet changing community needs.

2U – So Every Child Can Have a Happy Birthday
Anti-Bullying Coalition of Luzerne County Fund
The ATHENA Fund
Autism Awareness NEPA
The Debbie Darling Belenski Memorial Fund
1st Lieutenant Michael J. Cleary Memorial Fund
Concerned Parents of Hazleton Area Fund
The Cultural Council of Luzerne County Fund
Peter Degnan Memorial Endowment Fund
1LT Jeffrey F. DePrimo Memorial Fund
The District A Fund
Disaster Recovery Coalition Fund
Diversity Partnership Fund
Down Syndrome Network Fund
Earthly Angels Autism Fund
Eye Care Specialists Charitable Fund
Generation to Generation
The Lou Goeringer Family Fund
for the Visually Impaired
Grandparents Raising Grandchildren
Hazleton Integration Project
HKQ Fund for Children’s Advocacy
Hunts for Healing, Inc.
Luzerne-Wyoming Counties Elder Abuse
Task Force Fund
Luzerne County Keystone Active Zone Alliance
Making A Difference Fund
Max & Lorraine Fund
Gene & Lois McKeown Endowment
Miles for Michael Fund
The Phyllis Mundy Fund for Children
The Mural Fund
Rainbow Fund for Northeastern Pennsylvania
Remembering Jane Fund
The Responsibility Fund
The SHINE Fund
Schiowitz Grass Roots Housing Initiative Fund
Libby Schomas Fund
Louis Claude de St. Martin Fund
The Times Leader - Book of Dreams Funds
Valley With A Heart Benefits Fund The Wilkes-Barre
General Hospital Auxiliary Grants Fund
Wilkes-Barre Preservation Society Fund

For more detailed information about our Field of Interest Funds visit www.luzfdn.org
Organizational Endowments

A charitable agency or nonprofit organization creates an endowment fund to provide ongoing income to that particular organization. Leaders of nonprofit agencies or organizations often turn to The Luzerne Foundation to manage their endowments, thereby freeing valuable time to concentrate on the program work they know best. The Foundation provides investment management and accountability for all fund administration and accounting as well as gift records, distributions, filing reports and tax returns with the Internal Revenue Service.

Back Mountain Recreation Fund Endowment
Bear Creek Historical Society Dam Fund
The Constance L. Bell Library Fund Endowment
Junior Achievement of NEPA Fund Endowment
Junior League of Wilkes-Barre Fund Endowment
Osterhout Free Library Fund Endowment
SPCA Jade Memorial Fund Endowment
SPCA Spay/Neuter Endowment
Stewardship Endowment Fund of the North Branch Land Trust
Westmoreland Club Charitable Fund Endowment...NEW!
Wyoming/West Wyoming Little League Fund Endowment
Young Men’s Christian Association of Pittston Fund Endowment

Key Benefits of an Organizational Endowment Fund

EASY
Our professional, experienced staff provides technical assistance with planned gifts to the fund and offers oversight of the investment function of your fund.

FLEXIBLE
Additions can be made to your fund at any time. The Luzerne Foundation can accept gifts of many types of assets, including stock, real property, and closely-held assets. You can also grow your fund through fundraising such as special events and donor cultivation for planned or current gifts.

PERSONAL
Your fund is all about your organization and its goals for the fund, whether that’s long-range savings or funding for specific, mission-oriented events, scholarships, or programs.

EFFICIENT
We handle the administrative tasks of philanthropy—from keeping track of your gifts to acknowledgement letters tax reporting, audits and sending you quarterly statements of activity—all for a nominal administrative fee.
Scholarship Funds

Scholarship Funds are designed to most often support the education or schooling of local individuals. They are often established in memory or in honor of a loved one, friend or beloved educator. Scholarships can be designated to students of all ages and can be awarded for a variety of causes and educational purposes and institutions.

Kerron Barnes-Whitewater Challengers Scholarship Fund
Leanne BedwicK Scholarship Fund
The Jamie Baker Memorial Scholarship Fund...NEW!
The Arlene E. Beseker Memorial Scholarship Fund ...NEW!
Lisa Ann Marie Blau Memorial Brighter Future Award Fund
The Debbie Darling Belenski Memorial Scholarship Fund
Joan Blockus Nursing Scholarship Fund
Thelma K. & Samuel Bosch Scholarship Award Fund
Jeanne R. Butcher Memorial Scholarship Fund
The Butterfly Scholarship Fund
The Michael Carol Book Scholarship Fund
The Brian Cashmere Memorial Scholarship Fund
Robert J. Clark Scholarship Fund
1LT Michael J. Cleary Memorial Scholarship Fund
James Cortinger Memorial Scholarship Fund
Michael Daniel Memorial Scholarship Fund
1LT Jeffrey F. DePrimo Memorial Scholarship Fund
The James M. Desiderio, Jr. Memorial Scholarship Fund
The Daniel J. Distasio Memorial Scholarship Fund
Herbert L. Facher Award Fund
The Dr. Guy V. & D. Keith Ferrell Scholarship Fund
The J. J. Ferrara/Phil. Society Memorial Scholarship Fund
The Steven P. Geraci & Paul W. Penkala Memorial Scholarship Fund
The Ronald E. Hontz Memorial Scholarship Fund...NEW!
The Lila & Darnell Howard Memorial Scholarship Fund...NEW!
The Keelci Ever After Memorial Scholarship Fund
Mickey Gorham Memorial Blue & Gold Fund
FFCF - Alice Kender Honorary Scholarship
Mary Ann Malinics Kaminski Memorial Scholarship Fund
Edward Raymond Kenzakoski, III Memorial Scholarship Fund
The Thomas P. Kilduff Memorial Scholarship...NEW!
Dr. David W. Kistler Scholarship Fund
Knecht Scholarship Fund
Logue Family Scholarship Award Fund
Luzerne County Catholic School Education Scholarship Fund
LCCC Scholarship Fund
Carrie Martin "We Can Make the World a Better Place" Memorial Scholarship Fund
John Mashinski Memorial Scholarship Fund
John A. McCole Campership Trust for Wilkes-Barre YMCA
McGowan Cornerstone Award
The Joseph A. Moran Scholarship Fund
NEPA AIA Chapter Scholarship Fund
The Dr. Drue Paden Memorial Scholarship Fund
Frank Pasdon Memorial Scholarship Fund
Deborah Samko Pearlman Educational Scholarship Award
The Ann Marie Piasecki Memorial Scholarship Fund
Christina Mihalko Rock Memorial Scholarship Fund
Lawrence W. Roth, Esquire Memorial Scholarship Fund
Laura E. Rutkowski Memorial Scholarship Fund
Michael B. Schecter Memorial Scholarship Fund
Nathan N. Schiowitz Family -VTSC Jr. Membership Fund
Dr. Jennifer A. Sidari Memorial Scholarship Fund
Siegel Family Scholarship Fund
Judith Geer-Spitale Fund
Taylor Nursing and Rehabilitation Center — Health and Wellness Fund
The Charlotte Williams Thomas Award Fund
Wilbur Troy Memorial Scholarship Fund
Kyle Wega Memorial Scholarship Fund
Wilkes-Barre General Hospital Scholarship Fund
Fran Williams Head Start Scholarship Fund
The Leonard 'Big Red' Williams Scholarship Fund
Memorial Funds

When a loved one passes away many families and friends wish to create a lasting legacy in honor of his or her life. Making the decision of which charity or charities should receive donations can be daunting during this highly emotional time. A Memorial Fund at The Luzerne Foundation gives you time to consider how best to represent your loved one’s passions and interests.

Why a Memorial Fund?

A Memorial Fund is a charitable account set up at The Luzerne Foundation to accept donations of any amount in memory of a loved one. When you and/or your family is ready, you can use the money that accumulates in the fund to make a grant to a single cause or multiple grants to various organizations as you see fit. Or, if you prefer, you can create an endowment fund in your loved one’s name.

By establishing a Memorial Fund you will have the time to consider all options and decide which community organizations best represent the memory of your loved one.

Will I Know Who Made Gifts in Memory of my Loved One? Yes. You will receive a list of names and addresses of individuals and families who have made a gift to your Memorial Fund. The Luzerne Foundation will acknowledge every gift by sending a thank you letter to the donor on your behalf. All gifts are tax-deductible to the fullest extent allowed by law.

What Can I Do With the Donations Made to the Memorial Fund? You may use the funds to make grants to organizations recognized by the Internal Revenue Service as tax-exempt, not only in Luzerne County, but regionally. Examples include: Places of Worship, Public Libraries, Schools, Human Services Organizations, Fine Arts Organizations, Other Nonprofit Organizations.

How Do I Establish A Memorial Fund?

- Select the name of your fund and include it in the obituary using wording such as, “Memorial contributions may be made to: The John Smith Memorial Fund of The Luzerne Foundation 140 Main Street, 2nd floor Luzerne, PA 18709.

- Please contact The Luzerne Foundation at 570.714.1570 (or ask the funeral director to contact us) so that we are prepared to accept donations.

- Complete the paperwork (we will assist you with this) and select a family representative(s) who will decide how the donations to the fund will be distributed.
The Rusty Flack Society

Members:
Charles and Denny Barber
Kerron Barnes
Donna Bedwick
Mr. & Mrs. Frank Belevino
John and Renee Belevino
Tom and Karen Belevino
Mr. & Mrs. Joseph Blaum
Leonard Bieleski
Joseph & Jeanne Butcher
Marvin Carkhuff
Tom & Millie Cannon
James and Lorraine Cortegerone
Ray & Anne Crisci
John W. Dawe
Ronald & Brenda D'Eliseo
Philip and Judith Decker
Kristin Depman
Jerome and Vivien Facher
Rusty and Kathi Flack
Gus & Val Genetti
Omar and Peggy Hamilton
Mr. & Mrs. Frank M. Henry
Michael & Kathleen Hirthler
Dr. & Mrs. David Kistler
Ken & Ann Krogulske
Andrey T. Kurz
Sandra G. Lefkowitz
Melanie Lumia
John F. Magagna
Dick and Marilyn Maslow
Doug & Michaelene Maslow
Walter and Connie Mitchell
Rick & Roseanne Nardone
Joan Flack Nusbaum
Eugene & Connie Roth
Mary Jo Rushin
Dr. & Mrs. Benjamin Schecter
Jim & Susan Schilling
Dr. & Mrs. Rudolph Schleich
Blake & Mona Schomas
James & Joan Schonfeld
Chip Siegel
Mary Ruckno Siegel
George & Andrea Sordoni
Bill and Shelly Smulowitz
Charles & Judy Spitale
Joseph Turri
William J. and Constance M. Umphred
James & Regina Yates
Bob Yocum
John & Heather Yudichak

Named in honor of the late Charles D. Flack, Jr. “Rusty” who was a founding member of The Luzerne Foundation, longtime board member and community philanthropist. The Rusty Flack Society is a membership list of those who have named The Luzerne Foundation as the beneficiary of any type of planned or deferred gift and who choose to be listed. There is no minimum amount needed to qualify and, to date, The Foundation has received bequests, or is aware of future bequests or other types of planned gifts ranging from $1,000 to $4,500,000 from The Rusty Flack Society members. These gifts support numerous nonprofit organizations throughout the community.

The importance of creating a lasting legacy that will continue to have impact for generations led Rusty and his family to establish The Flack Family Fund at The Luzerne Foundation. “Rusty always talked about the importance of doing something today that would grow and last for years to come,” said Charles Barber, President and CEO of The Luzerne Foundation. “Associating his name with this legacy society is a fitting tribute to him and his family and it serves as a reminder of The Foundation’s mission to support the community far into the future.”

For more information about the Rusty Flack Society please contact The Luzerne Foundation at 570-714-1570 or visit www.luzfdn.org.
Rusty Flack Society: A Legacy of Giving...

Mid-winter gathering highlights of friends, donors, fundholders and Rusty Flack Society Members
We’re Committed to Excellence

The Luzerne Foundation works continually to maintain the highest philanthropic standards for operational quality, integrity and accountability.

The National Standards for U.S. Community Foundations Program, based in Arlington, VA, requires community foundations to document their policies for donor services, investments, grantmaking and administration. With over 500 community foundations in 49 states already confirmed in compliance nationwide, the program is designed to provide quality assurance to donors, as well as to their legal and financial advisors.

The National Standards addresses five key areas of community foundation operations: Structure and Governance; Resource Development; Accountability; Grantmaking; Community Engagement.

Community foundations represent one of the fastest-growing forms of philanthropy in the United States and hold nearly $66 billion in assets, according to the Foundation Center. Every state in the U.S. is home to at least one community foundation—large and small, urban and rural—that is advancing solutions to a wide range of community and social issues. Although community foundations make up only one percent of all U.S. grantmaking foundations, they account for more than 10 percent of all foundation giving!

<table>
<thead>
<tr>
<th>Assets</th>
<th>2013 Audited</th>
<th>2014 Audited</th>
<th>2015 Unaudited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Pass-through Funds</td>
<td>$4,686,785</td>
<td>$2,494,084</td>
<td>$3,028,395</td>
</tr>
<tr>
<td><strong>Endowment Assets</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unrestricted - General Purpose</td>
<td>$1,275,256</td>
<td>$1,324,202</td>
<td>$1,204,147</td>
</tr>
<tr>
<td>Donor Advised</td>
<td>$10,121,891</td>
<td>$11,084,567</td>
<td>$10,566,019</td>
</tr>
<tr>
<td>Scholarship Funds</td>
<td>$4,344,144</td>
<td>$4,927,838</td>
<td>$4,782,953</td>
</tr>
<tr>
<td>Field of Interest Funds</td>
<td>$2,057,463</td>
<td>$2,082,805</td>
<td>$1,982,536</td>
</tr>
<tr>
<td>Designated Funds</td>
<td>$2,028,453</td>
<td>$2,512,713</td>
<td>$3,435,874</td>
</tr>
<tr>
<td>Organizational Endowments</td>
<td>$4,072,921</td>
<td>$4,386,033</td>
<td>$6,009,354</td>
</tr>
<tr>
<td><strong>TOTAL ENDOWMENT ASSETS</strong></td>
<td><strong>$23,900,128</strong></td>
<td><strong>$26,318,158</strong></td>
<td><strong>$27,980,883</strong></td>
</tr>
<tr>
<td>Pledges Receivable</td>
<td>$36,000</td>
<td>$21,199</td>
<td>$34,199</td>
</tr>
<tr>
<td>CRUT and Gifts Receivable</td>
<td>$327,098</td>
<td>$383,243</td>
<td>$383,243</td>
</tr>
<tr>
<td>Buildings</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Leasehold Improvements and Equipment</td>
<td>$1,070,000</td>
<td>$1,070,000</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$28,950,011</strong></td>
<td><strong>$30,286,684</strong></td>
<td><strong>$32,496,720</strong></td>
</tr>
</tbody>
</table>

| Liabilities & Equity           |              |              |                |
| Liabilities                    |              |              |                |
| Accounts Payable               | $6,435       | $1,850       | $1,850         |
| Payroll Taxes Payable          | $7,318       | $7,196       | $7,196         |
| Funds held as Agency/Organization Endowments | $3,947,036 | $4,288,964 | $5,860,080 |
| **Total Liabilities**          | **$3,960,789** | **$4,298,010** | **$5,869,126** |

| Equity                          |              |              |                |
| Unrestricted                    | $24,662,124  | $24,535,431  | $25,174,351    |
| Temporarily Restricted          | $327,098     | $1,453,243   | $1,453,243     |
| **Total Equity**                | **$24,989,222** | **$25,988,674** | **$26,627,594** |
| **TOTAL LIABILITIES & EQUITY**  | **$28,950,011** | **$30,286,684** | **$32,496,720** |

As a 501(c)3 charitable organization and a recognized community foundation, The Luzerne Foundation files an annual Form 990 with the Internal Revenue Service. The Foundation’s filed Form 990’s are available on our website www.luzfdn.org or for public inspection at The Foundation offices. Audited Financial Statements are available upon request.
### Donor Advised Funds vs. Private Foundations

When compared to a private foundation, a donor advised fund at The Luzerne Foundation is a smart way to achieve your philanthropic goals with greater tax advantages, fewer administrative hassles, more cost savings and a highly comparable level of grantmaking flexibility.

Private foundations that transfer assets to The Luzerne Foundation enjoy immediate excise tax relief, freedom from reporting requirements and lower administrative costs. This often means that more of the foundation’s assets can be used for true philanthropic purposes.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Donor Advised Fund</th>
<th>Private Family Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Control</strong></td>
<td>• Donor recommends grants to Foundation’s Board for approval</td>
<td>Board of trustees have complete control of grantmaking distributions and responsibility for asset management</td>
</tr>
<tr>
<td></td>
<td>• Foundation is responsible for asset management</td>
<td></td>
</tr>
<tr>
<td><strong>Investments</strong></td>
<td>• Foundation’s Investment Committee oversees investment policies</td>
<td>Foundation’s financial advisor</td>
</tr>
<tr>
<td><strong>Distribution Requirements</strong></td>
<td>None</td>
<td>5% of net asset value annually</td>
</tr>
<tr>
<td><strong>Costs</strong></td>
<td>None to establish</td>
<td>Significant costs for legal, accounting and filing fees to establish</td>
</tr>
<tr>
<td><strong>Time to establish</strong></td>
<td>Immediate</td>
<td>Several months</td>
</tr>
<tr>
<td><strong>Minimum Contribution Recommended</strong></td>
<td>$5,000</td>
<td>$5 Million</td>
</tr>
<tr>
<td><strong>Taxes</strong></td>
<td>None</td>
<td>Excise tax up to 2% of net investment income, including net capital gain</td>
</tr>
<tr>
<td><strong>Administration / Reporting</strong></td>
<td>• All record keeping and accounting performed by Foundation staff</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Tax exempt status already established</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Public reporting performed by staff</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Director/Officer liability insurance in place</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Must file annual tax returns including detailed financial schedule (Form 990-PF)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Must establish tax exempt status with IRS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Must prepare reports for general public</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Must obtain director/Officer liability insurance</td>
<td></td>
</tr>
<tr>
<td><strong>Deductibility of Gifts</strong></td>
<td>• Cash gifts deductible up to 50% of the adjusted gross income (AGI)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gifts of appreciated property deductible at fair market value (up to 30% of AGI)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cash gifts deductible up to 30% of the adjusted gross income (AGI)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gifts of appreciated property deductible at fair market value (up to 20% of AGI)</td>
<td></td>
</tr>
<tr>
<td><strong>Grantmaking</strong></td>
<td>• Donor has access to Foundation staff for due diligence, research and expertise; recommends grants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Foundation staff oversees evaluation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Board and staff must do research, due diligence, review and monitor proposals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Board and staff must develop evaluation process</td>
<td></td>
</tr>
</tbody>
</table>

The Luzerne Foundation stands ready to assist you in your charitable endeavors. Please contact us at 570.714.1570.

---

The Luzerne Foundation Annual Report  page twenty-one
Dear Friends,

We have 100 million reasons to celebrate! In March of 2016, we reached a $100 million grantmaking milestone since our inception in 1994. But even more important than the amount of our grant total is the impact measured by recipient organizations across our community and across the world.

This worthy milestone is a testament to the dedication of The Luzerne Foundation’s Staff, Board Members, Professional Advisors and its Donors, and all others devoted to helping us build this vital philanthropic institution. Each year we help to set up different charitable funds, some large and some small which are established by individuals, families, non-profits and businesses, all to benefit the people of Luzerne County and our region. We help to put into place sustaining legacies which allow the ideas and assets of these donors to live on into perpetuity.

The Luzerne Foundation continues to focus on helping students secure a better future, making the arts accessible to all, breaking the cycle of inter-generational poverty, increasing the impact of many local non-profit organizations and providing countless other community-oriented services. As a trusted non-profit partner and thought leader, we bring together community organizers, business experts and philanthropists to solve many of our region’s most pressing challenges.

As we move forward, we are now working on our next $100 million! We know that with your continued help this will happen a lot quicker than our first centennial milestone. We thank you for all you have done in the past and for what we know you will do in the future, as we continue to create positive change in our local communities.

We all have 100 million reasons to celebrate!

We are...Here for good.™

Charles M. Barber, President and CEO